

AGREEMENT FOR SERVICES

Project:

Professional Environmental and Safety Medical Consulting Services

In consideration of the mutual promises set forth below, intending to be legally bound, **THE SCHOOL DISTRICT OF PHILADELPHIA**, a body corporate and political subdivision formed and existing under the laws of the Commonwealth of Pennsylvania (the "School District"), located at the Education Center, 440 North Broad Street, Philadelphia, Pennsylvania 19130-4015, and _____, a _____ corporation (the "Contractor"), located at _____ (the "Contractor"), have executed and delivered this Agreement for Services (the "Contract") as of _____, 2018.

1. ***The Engagement, the Work, the Standard Terms and Conditions.*** Subject to the terms and conditions set forth in this Contract, the School District engages the Contractor to carry out the work (the "Work") described in the School District's Request for Proposal/Qualifications To Provide Professional Environmental and Safety Medical Services ("RFP"), Section 5.0 Project Scope, and Table 1: Medical Services Matrix (RFP Exhibit "A"), and the Contractor's Technical Proposal for Professional Environmental and Safety Medical Services, Section entitled "Contractor's Description of Scope of Services", collectively attached hereto as Exhibit "A" – "Contractor's Scope of Services" and incorporated by reference into this Contract, and the Contractor's Fee Proposal and Fee Schedule (Attachment H), collectively attached hereto as Exhibit "B" and incorporated by reference into this Contract. The Work includes all Labor, Materials, Supplies and Equipment the Contractor has agreed to provide, the time frames in which the Contractor has agreed to complete the Work, and all other requirements the Contractor must satisfy in order to complete the Work during the Term (defined in Section 3 below). The terms and conditions of this Contract include the School District Standard Terms and Conditions (the "Standard Terms and Conditions"), attached hereto as Exhibit "C" and incorporated by reference into this Contract.

a. The School District is required by the Federal Regulations of the United States Environmental Protection Agency ("USEPA") Worker Protection Rule and the Occupational Safety and Health Administration ("OSHA") and the Local Regulations of the City of Philadelphia, Department of Public Health, Asbestos Control Regulations ("ACR"), to provide Medical Surveillance to School District employees whose work involves abatement of asbestos-containing materials, or who perform asbestos, lead and mold abatement activities, or who perform trades work, such as steam fitting and plumbing, while in an asbestos-containing work environment. The School District's Employee Medical Surveillance Program requires annual

medical testing and respirator fit testing and certain medical assessments and periodic monitoring of School District employees whose work involves the abatement of asbestos-containing materials or School District employees whose work requires access to asbestos regulated workspaces.

b. The Contractor shall provide medical services on an as-needed basis for the School District's Employee Medical Surveillance Program. All medical services of the Contractor shall meet all of the applicable requirements of the laws, rules, regulations, standards or guidelines as specified in this Contract and the RFP, and particularly, the RFP, Table 1: Medical Service Matrix (RFP Exhibit "A").

c. The Contractor shall perform the following professional environmental and safety medical services (the "Work" or "Medical Services"): (i) Medical Surveillance for Asbestos Workers ("OSHA"), including Initial Examinations and Periodic (Annual) Examinations; (ii) Chest Roentgenograms with interpretation and classification (B Reader); (iii) Medical Clearance to use Respirator; and (iv) Respiratory Fit testing (Qualitative and Quantitative). The Contractor shall perform all of the Services Specific Descriptions and Requirements for all of the Medical Services, as specified in the RFP, at 5.0 Project Scope, Section B. Scope of Services, and this Contract. The Services Specific Descriptions and Requirements for (i) Medical Surveillance, (ii) Chest Roentgenograms with Interpretation, (iii) Medical Clearance to Use Respirator, and (iv) Respirator Fit testing, as specified in the RFP, at 5.0 Project Scope, Section B. Scope of Services, are attached as part of Exhibit "A" and incorporated by reference into this Contract. **The Contractor must provide all of the Medical Services as described in the RFP and this Contract.**

d. The Contractor shall perform the Medical Services on an as-needed basis. **The Contractor must be accredited, certified or licensed to provide the Medical Services specified in the RFP and this Contract.** For asbestos related Medical Services, this includes providing at least one B-Reader, or an experienced physician with known expertise in pneumoconioses, for roentgenograms interpretation,

e. The Contractor shall provide Medical Services to the following groups of School District employees: (i) those who Manage and Implement the School District's AHERA Program; (ii) Asbestos Abatement and Lead Abatement Workers and Supervisors; (iii) Designated Facilities, Maintenance and Operations Staff; and (iv) Capital Programs Inspectors and Project Managers.

f. The Contractor shall provide the Medical Services to School District employees as mandated by various Federal, State and Local regulatory programs and guidelines in accordance with the RFP, Table 1: Medical Services Matrix. All Medical Services provided by the Contractor shall meet all of the applicable requirements and standards of the various Federal, State and Local laws, rules, regulations, regulatory requirements, standards, programs and guidelines as specified in the RFP, Table 1: Medical Services Matrix, including, but not limited to, the Acts, laws, and regulations and all related standards, standard interpretations, rules, guidance, guidelines and programs which require or recommend the Medical Services.

g. All examinations and procedures must be performed by or under the supervision of a licensed physician.

h. The Contractor shall provide the Medical Services in its own facilities. The Contractor's facilities must be available to the School District at a reasonable time and place. The Contractor shall have the capability to provide a mobile medical services unit to provide the Medical Services on-site at School District designated locations. The School District may choose to conduct Medical Services at the same location and time as a group receives annual training.

i. The Contractor must have an on-going schedule of operation to enable School District employees to be scheduled to receive Medical Services at a time and place convenient to the School District employee. Medical Services at the Contractor's location shall be available within at least 48 hours after the School District's making a request for an appointment. If a mobile medical services unit is requested for a School District location, the Medical Services shall be scheduled and provided within one (1) month of the initial School District request.

j. The Contractor shall have the capacity (staff and equipment and mobile facilities) to provide Medical Services for at least 40 employees a day in either its own facilities or a mobile medical services unit.

k. The RFP Fee Schedule, as well as the Contractor's Fee Schedule, list the following eight (8) Medical Services and includes unit prices for each of these Medical Services at the School District's location and at the Contractor's location: (i) Asbestos Examination – Initial (ID: AME-1); (ii) Asbestos Examination – Periodic (ID: AME-P); (iii) Chest X-Rays (ID: CXR); (iv) Respirator Medical Clearance Initial Clearance (ID: RMC); (v) Respirator Fit Test (ID: RFT); (vi) Combined Examination 1 (AME-1 + CXR + RMC + RFT) (ID: CE-1); (vii) Combined Examination 2 (AME-P + CXR + RMC + RFT) (ID: CE-2); and (viii) Combined Examination 1 (AME-P + RMC + RFT) (ID: CE-3). The RFP Fee Schedule, as well as the Contractor's Fee Schedule, provide the estimated number of staff or Deliverables or Patients per year to receive the following five (5) Medical Services: (i) ID: AME-1; (ii) ID: AME-P; (iii) ID: CXR; (iv) ID: RMC; and (v) ID: RFT. The RFP Fee Schedule, as well as the Contractor's Fee Schedule, also list the following charges and expenses: (i) Mobilization Charge per School District location - Transportation and Set-up Charge (ID: OS-M1); (ii) Daily Charge for Equipment and Personnel - Per Diem Charge to Provide Medical Services at a School District location, inclusive of all Equipment, Medical Personnel, Supplies, and Expenses (ID: OD-DC); (iii) Quarterly Summary Report– one (1) report for all Medical Services (ID: QSR); and (iv) Respirator Fit Test ID Card (ID: RFTID). The RFP Fee Schedule, as well as the Contractor's Fee Schedule, provide the estimated number of Deliverables or Patients per year for the following charges and expenses: (i) ID: OS-M1; (ii) ID: OD-DC; (iii) ID: QSR; and (iv) ID: RFTID. However, **the Contractor acknowledges and agrees that the School District is not committing to, nor guaranteeing any minimum amount of Medical Services under this Contract.**

l. The Medical Services specified in RFP Table 1: Medical Services Matrix, the RFP Fee Schedule, and the Contractor's Fee Schedule are anticipated to be required over the

first fiscal year of the School District, which is from July 1st to June 30th of the following year.

m. The Contractor shall organize, secure, and transmit the employee medical records developed under this Contract in a format so that they may be retained and made available in accordance with 29 CFR 1910.1020.

n. The Contractor shall provide to the School District all of the written opinions, reports, interpretations, recommendations, test results, and other documentation or deliverables specified in the RFP, Section II.B. Scope of Services, and this Contract.

o. The Contractor must keep and report all records to the School District via secure electronic computer files.

2. **Resolution.** The School Reform Commission (“SRC”) authorized this Contract by its resolution number A-__, dated _____, 2018. The Parties have attached this resolution to this Contract as Exhibit “D” and have made this resolution a part of this Contract. The School District has no power to contract for goods or services outside the scope of the resolution.

3. **Contract Term.** The School District intends to secure professional environmental and safety medical services for a total term of up to four (4) calendar years. However, the School District reserves the right to limit the time of this Contract and does not guarantee the assignment of the complete program to any single contractor. The School District initially intends to award this Contract for a one (1)-year term, related to the fiscal year of the School District, with allowance of up to three (3) annual renewals. The initial one (1) year Contract Term shall begin on the date of the Notice to Proceed or July 1, 2018 and shall continue until the funds are exhausted or the end of the fiscal year of the School District (June 30, 2019) (the “Initial Term”), unless otherwise noted or terminated sooner by the School District as provided in this Contract. The Contractor shall commence the Work promptly on the first day of the Contract Term and complete the Work not later than the last day of the Contract Term.

a. **Option to Renew.** The School District shall have the option, at its sole discretion, to renew this Contract, for up to three (3) additional periods (July 1st to June 30th), (individually an “Additional Term”, and collectively, “Additional Terms”), upon the same terms, fees, conditions and compensation methods specified in this Contract, the Contractor’s Fee Schedule and the Standard Terms and Conditions, as modified herein, of this Contract. At least thirty (30) calendar days prior to the expiration of the then current Contract Term, or when 25% of the original Contract funds remain, the School District, at its sole discretion, may notify the Contractor, in writing, of its intent to recommend renewal of this Contract for an additional one (1)-year period to the SRC. Within ten (10) calendar days of its receipt of the School District’s notice of its intention to recommend renewal of this Contract, the Contractor shall notify the School District of its agreement to renew this Contract. Renewal shall be effective only upon formal approval by resolution of the School District Board of Education (the successor entity to the SRC). The total authorized Contract Term under this Contract may be for a maximum time period of up

to four (4) years up to June 30, 2022, unless the School District Board of Education authorizes a further renewal or extension by resolution.

4. **Compensation.** As compensation for the satisfactory performance of the Work carried out by the Contractor hereunder, the School District shall pay the Contractor, in arrears, a total fee not to exceed the aggregate amount of _____ **Dollars** (\$ _____), **conditioned, however, upon the continued availability of funds, as set forth in Sections 6 and 7 of the Standard Terms and Conditions** (the "Compensation"). The School District reserves the right to limit the amount of this Contract, and will not guarantee the assignment of the complete program to any single contractors.

a. The Contractor shall carry out the Work and bill the School District strictly in conformity with the Contractor's Fee Schedule, attached as Exhibit "B", and Paragraph 4 of this Contract. The School District shall pay the Contractor strictly in conformity with the Contractor's Fee Schedule and Paragraph 4 of this Contract.

b. **Fee Structure.** All payments to the Contractor under this Contract shall be made on a per service, per employee unit cost basis. The cost paid per employee medical service shall depend on the specific medical services as defined by the Contractor's Fee Schedule. The total Medical Services program under this Contract shall consist of the medical services as summarized on the Contractor's Fee Schedule and the RFP, at Table 1: Medical Services Matrix. The number of implied total medical services to be provided is an estimate and not a guarantee by the School District.

c. **Fee Schedule.** Fees, rates and costs of the Contractor shall cover all related overhead, profit, supplies, materials, travel, etc. for performance of Work required under this Contract. The School District shall reject requests by the Contractor for compensation beyond that stated in its Fee Schedule. **Costs shown in the Contractor's Fee Schedule shall remain firm and fixed for the duration of the Contract, except that costs shown may increase or decrease in accordance with the CPI-U Index. Prices for each of the option years will be adjusted (increased or decreased) according to the corresponding increase or decrease in the CPI-U Index "All Urban Consumers, All Items, Philadelphia, Wilmington, Atlantic City, PA-DE-NJ-MD" for the previous twelve month period from April to April.** The Contractor's Fee Schedule must reflect **firm fixed prices** for the entire first year term of the Contract. Rates may increase or decrease in each successive Contract year beginning on July 1st in accordance with the CPI-U Index.

d. **No changes, deletions or exceptions to the Contractor's Fee Schedule shall be accepted by the School District. Only one (1) price per line item in the Contractor's Fee Schedule shall be permitted.**

e. **All fees shall be based on each unit identified as Per Hour, Per Day, Per Week and/or Per Sample as listed in the Contractor's Fee Schedule.**

f. **The Contractor shall not place minimum or maximum values to any**

line item listed in the Contractor's Fee Schedule.

5. **Invoices.** The Contractor shall submit timely invoices to the School District Responsible Official named in Section 8 below and, unless the Parties have agreed to a different schedule as set forth in Exhibit "A" or Exhibit "B" hereto, the Contractor shall submit not more than *one (1) invoice per month*. The Contractor shall submit its final invoice not later than ten (10) business days after the last day of the Contract Term.

a. The Contractor shall submit invoices in accordance with Section 3 of the Standard Terms and Conditions and Paragraph 5 of this Contract. All invoices for Medical Services shall be provided on a unit price (per employee participant, per Medical Service) basis according to the unit prices specified in the Contractor's Fee Schedule and this Contract. All invoices must include a detailed cost breakdown for the Medical Services rendered in terms of number of School District employees receiving medical services. Electronic copies of all related medical records must also be submitted concurrently with the invoice.

b. Each invoice must also include all required information and be signed by the principal of the Contractor. Invoices shall not be processed by the School District unless electronic copies of all related medical records and documentation related to the services on the invoice have been submitted on CD-ROM concurrently with the invoice to the School District.

c. The School District shall have no obligation to make any payment to the Contractor before receipt of a properly prepared invoice and required electronic medical records and other documentation that conforms to the requirements of this Contract.

6. **Federal Employer Identification Number.** The Contractor's federal employer identification number is: _____.

7. **Disputes.** The Parties agree to exercise every reasonable effort to resolve disputes that may arise under this Contract through informal negotiation and cooperation. If the Parties are unable to resolve any disputes arising under this Contract, then a Party claiming that a dispute has arisen in connection with this Contract or its subject matter will give prompt notice to the other Party describing the dispute in reasonable detail. Promptly after receipt of the Dispute Notice, the Parties will negotiate in good faith to resolve the Dispute. Either Party may escalate the Dispute negotiations to higher level personnel, by notice to the other Party, as specified below:

School District	Contractor	Time After Dispute Notice
Environmental Manager, Environmental Services	Project Manager	15 days
Director, Environmental Services	Project Manager	15 days
Acting Director or Director, Capital Programs	Principal in Charge	15 days

All limitations periods and the running of laches are tolled during the pendency of dispute resolution.

8. **Notices.** The Parties shall give notices and other communications required under this Contract in conformity with Section 21 of the Standard Terms and Conditions and shall send all notices to:

School District Responsible Official: Contractor: _____

Name: Francine Locke _____
 Title: Director, Office of Environmental _____
 Management and Services _____
 Party: The School District of Philadelphia _____
 Address: 440 N. Broad Street, Suite 373 _____
 Philadelphia, PA 19130-4015 _____
 Telephone: (215) 400-4750 () _____
 Fax: (215) 400-4751 () _____
 E mail address: flocke@philasd.org _____

Program Office Environmental Management and
 (School District) Services

9. **Key Personnel.** The following Key Personnel, all of whose qualifications and resumes have been provided, shall perform the environmental and safety medical services (the "Work") required under this Contract:

<u>Name</u>	<u>Position</u>
_____	_____
_____	_____
_____	_____
_____	_____

The Contractor shall not remove, reassign, replace, or substitute any listed Key Personnel, without the prior written notice to and consent of the School District, which consent shall not be unreasonably withheld. In the event that these persons become unavailable to perform the required Work under this Contract, the Contractor shall obtain the School District's prior approval of any selected substitute personnel, which approval shall not be unreasonably withheld.

10. **M/WBE Participation Plan.** The Contractor shall comply with the School District's Anti-Discrimination Policy, which is incorporated by reference into this Contract. The Contractor shall ensure that minority-owned business enterprises ("MBEs"), and women-owned business enterprises ("WBEs") have the maximum opportunity to participate in the performance of this engagement, and shall make a good-faith effort to achieve the goals. The Contractor represents and certifies that it will include a combined range of 15% to 20% participation with a minority-owned business enterprise(s) firm (MBE) and a woman-owned business enterprise(s) firm (WBE) based on the total Contract award. The Contractor's M/WBE Participation Plan is

attached as Exhibit "E" and incorporated by reference into this Contract.

11. *Order of Precedence.* The Parties have attached the following Exhibits to this Contract, each of which the Parties have agreed to incorporate in and make a part of this Contract:

<u>Exhibit</u>	<u>Exhibit Name</u>
"A"	Contractor's Scope of Services
"B"	Contractor's Fee Proposal and Fee Schedule
"C"	School District Standard Terms and Conditions
"D"	SRC Resolution
"E"	Contractor's M/WBE Participation Plan

In the event of a conflict between any Exhibit and another Exhibit, or this Agreement for Services, the following order of precedence shall apply: first, this Agreement for Services; second, Exhibit "C"; third, Exhibit "A"; fourth, Exhibit "B"; fifth, Exhibit "E"; and sixth, Exhibit "D".

12. *Modifications.* The Parties have agreed to the following modifications to the terms and conditions set forth elsewhere in this Contract.

a. *Standard of Performance.* Strike subsection 1.a., *Standard of Performance*, page 1, Exhibit "C", the Standard Terms and Conditions, and substitute:

a. *Standard of Performance.* The Contractor shall exercise a high degree of professional skill, care, diligence and competence in the rendition of its Services under this Contract in accordance with the professional standards prevailing in the metropolitan Philadelphia area for the provision of services such as those provided in this Contract. The Contractor's attention is directed to the fact that the Services are urgently needed by the School District. The Contractor's Services under this Contract shall be performed as expeditiously as is consistent with said professional standards and sound professional practices. The Contractor shall use its best efforts to assure timely and satisfactory completion of its Services in accordance with the School District's project or work schedules. The Contractor shall at all times act in the best interest of the School District, consistent with the professional obligations assumed by it in entering into this Contract. The Contractor shall perform all Services under this Contract in accordance with the terms and conditions of this Contract and to the reasonable satisfaction of the School District. All Services to be performed by the Contractor that require the exercise of professional skills or judgment shall be accomplished by professionals licensed or certified to practice in the applicable professional discipline in the Commonwealth of Pennsylvania. The Contractor shall remain responsible for the professional and technical accuracy of all Services furnished under this Contract. All Services of the Contractor and its Subcontractors shall be done in consultation with, or under the direction of, a representative of the School District's Director or Acting Director of Capital Programs.

b. *Meetings.* Strike subsection 1.f., *Meetings*, page 1, Exhibit "C", the Standard Terms and Conditions, and substitute:

f. *Meetings; Minutes, Reports, Communications and Correspondence.* The Contractor shall prepare for, attend, and participate in meetings with School District representatives of the Office of Environmental Management and Services' representatives. Upon request or as required by this Contract, the Contractor shall prepare and distribute minutes of meetings, progress reports, and any other reports, correspondence and communications to School District representatives of the Environmental Management and Services' representatives, in an electronic format designated by the School District. Upon request or as required by this Contract, the Contractor shall provide the School District with oral or written reports of its activities, on a monthly basis or more often as needed or required.

c. *Best Pricing.* Strike Section 5., *Best Pricing*, page 3, Exhibit "C", the Standard Terms and Conditions.

d. *Independent Contractor.* Strike Section 8., *Independent Contractor*, page 3, Exhibit "C", the Standard Terms and Conditions, and substitute"

8. *Status of Contractor.* The Contractor is an authorized representative of the School District, and shall have the powers, duties and responsibilities that are delegated by the School District to the Contractor under this Contract. The Contractor is not an employee of the School District and its agents, employees and Subcontractors are not entitled to any benefits or privileges acquired in the ordinary course of employment from the School District.

e. *Non-Discrimination.* Add the following sentences to Section 9., *Non-Discrimination*, page 4, Exhibit "C", the Standard Terms and Conditions:

The Contractor's Proposal, M/W/BE Participation Plan, is attached as Exhibit "F" and incorporated by reference into this Contract. The Contractor shall not replace or substitute the M/WBE firms identified in the Contractor's Proposal, M/W/BE Participation Plan, or increase or decrease the contract MBE/WBE percentages, or increase or decrease the dollar amounts for the MBE/WBE firms, without the prior written notice to and approval of the School District. The Contractor shall promptly submit any revised M/W/BE Participation Plans to the School District for its prior approval.

f. *Indemnification.* Strike subsection 13.a., *Indemnification*, page 5, Exhibit "C", the Standard Terms and Conditions, and substitute:

a. *Indemnification.* The Contractor agrees to assume liability for and does specifically agree to indemnify, save, protect, and hold harmless the School District, its SRC members, Board of Education members or directors, officers, employees and agents, from and against any and all liability, losses, claims, suits, actions, costs, damages and expenses (including, but not limited to, attorneys' fees, court costs and legal expenses of whatever kind or nature) imposed on or asserted against the School District, and arising out of or in any way related to the Contractor's carrying out the provisions of this Contract, including, but not limited to, any claim for actual or alleged loss of life, bodily injury, personal injury, or damage to property, alleged to have been caused, in whole or in part, by the negligent acts, errors, omissions, breaches of contract or employment

discrimination of the Contractor, its officers, agents, employees, servants, or Subcontractors acting pursuant to this Contract; or arising out of this Contract with the School District and related to any claim whatsoever brought by or against any agent, servant, employee, or Subcontractor of the Contractor for any alleged negligence or condition caused or contributed to, in whole or in part, by the School District; and from any claim for license fees or taxes for which the Contractor is or may become responsible. The Contractor agrees that in the event that any employee of the Contractor makes any claim or files a lawsuit against the School District for any alleged injury on School District property or in connection with services being performed by the Contractor under this Contract that the Contractor shall fully defend, indemnify and hold harmless the School District for all damages, losses and expenses which may result therefrom (including attorneys' fees, court costs and legal expenses of whatever kind or nature). This indemnity provision is expressly intended to waive the statutory immunity afforded to the Contractor as an employer pursuant to §481(b) of the Pennsylvania Workers' Compensation Act, 77 P.S. §481(b), and to permit the School District to seek contribution or indemnity from the Contractor in the event that the School District is sued by an employee of the Contractor. The parties further intend that this waiver satisfy the judicial requirements applicable to an express waiver as articulated by the Superior Court of Pennsylvania in Bester v. Essex Crane Rental Corp. v. Russell Construction Co., 619 A.2d 304 (Pa.Super. 1993).

g. *Insurance.* Strike Section 15., *Insurance*, pages 6-7, Exhibit "C", the Standard Terms and Conditions, and substitute:

15. **Insurance Requirements.** The Contractor shall, at its own expense, procure and maintain the types and minimum limits of insurance specified below covering the performance of the Work. All insurance shall be procured from reputable insurers who are financially responsible and authorized to do business on an admitted basis in the Commonwealth of Pennsylvania or otherwise acceptable to the School District's Office of Risk Management. All insurance must be afforded by an insurance carrier with at least an A- (Excellent) rating from a reputable agency (e.g., A.M. Best). All insurance herein, except the professional liability insurance, shall be written on an "occurrence" basis and not a "claims-made" basis. In no event shall work be performed until the required evidence of insurance has been provided. The insurance shall provide for at least thirty (30) days prior written notice to be given to the School District in the event coverage is materially changed, cancelled or non-renewed. The School District of Philadelphia and its officers, employees and agents shall be named as additional insureds on all liability policies (except Workers' Compensation & Professional Liability), and the policies shall be so endorsed. Endorsements are required stating that the coverage afforded the School District and its officers, employees and agents as additional insureds will be primary to any other coverage available to them, and that no act or omission of the School District or its officers, employees and agents shall invalidate the coverage, other than an act or omission that would constitute willful misconduct or gross negligence. The Contractor will waive all rights of recovery against the School District of Philadelphia (where allowed by law) and all the additional insureds for loss or damage covered by any of the insurance maintained by the Contractor.

(a) **Workers' Compensation and Employer's Liability.**

- (1) Workers' Compensation: Statutory Limits.
- (2) Employers' Liability: \$500,000 Each Accident – Bodily Injury by Accident; \$500,000 Each Employee – Bodily Injury by Disease; and \$500,000 Policy Limit – Bodily Injury by Disease.
- (3) Other states insurance coverage and Pennsylvania endorsement.

(b) **Commercial General Liability Insurance.**

- (1) Limit of Liability: \$1,000,000 per occurrence combined single limit for bodily injury (including death) and property damage liability; \$1,000,000 personal and advertising injury; \$2,000,000 general aggregate and \$2,000,000 aggregate for products and completed operations. Products/Completed Operations must be maintained for at least 2 years after final payment (including coverage for Additional Insureds as set forth below. The General Aggregate should apply on a per project basis. The School District may require higher limits of liability if, in the School District's sole discretion, the potential risk so warrants.
- (2) Coverage: Premises operations; blanket contractual liability; personal injury liability; products and completed operations; independent contractors; employees and volunteers as additional insureds; cross liability; and broad form property damage (including completed operations).
- (3) The School District may require higher limits of liability if in the School District's sole discretion, the potential risk so warrants.

(c) **Automobile Liability Insurance.**

- (1) Limit of Liability: \$1,000,000 per occurrence combined single limit for bodily injury (including death) and property damage liability.
- (2) Coverage: Owned, non-owned, and hired vehicles.
- (3) If transportation of hazardous material is involved, the policy shall include the following endorsements: MCS-90 and ISO-9948.

(d) **Professional Liability Insurance.**

- (1) Limit of Liability: \$2,000,000 with a deductible not to exceed \$100,000.
- (2) Coverage: Environmental contractors errors and omissions, including liability assumed under this Contract.
- (3) Professional Liability Insurance may be written on a claims-made basis provided that coverage for occurrences arising out of the performance of the Services required under this Contract shall be maintained in full force and effect for a retroactive date prior to work and an extending reporting period of 60 months after the work is completed.

(e) **Excess Umbrella Liability.**

- (1) Limit of Liability: at least \$10,000,000.00 combined single limit and at least \$10,000,000.00 aggregate limit with an additional insured endorsement for the School District on the liability policy. The General Aggregate must apply on a per project basis.
- (2) Coverage: Limits in excess of underlying limits in underlying primary insurance policies and broader coverage than combined scope of underlying primary insurance policies.

(f) **Environmental Liability/Contractor's Pollution Insurance.**

- (1) Limit of Liability: \$2,000,000 with a deductible not to exceed \$100,000.
- (2) Coverage: Pollution Liability.
 - (i) Remediation: 5 Years Completed Operations.
 - (ii) Pay on behalf of in lieu of indemnity.
 - (iii) Occurrence form – Gradual and Sudden/Accidental Pollution. (At its sole discretion, the School District may accept a claims made policy with a “tail” of 3 years after the date of final payment by the School District. If the School District decides to accept such a claims made policy, this decision will be indicated in the RFP/RFQ, Addendum or the RFP/RFQ, Questions and Answers.)
 - (iv) Covered operations – all those performed by or on behalf of the Named Insured.
 - (v) Include coverage for the insured's liability for services or contracting operations performed by others on its behalf.
 - (vi) Coverage Extensions Required: Transportation; Non-Owned Disposal Site & Microbial Matter.

(g) **Crime Insurance:** The Subcontractor shall be responsible for maintaining Crime Insurance, which includes the Employee Theft and Theft, Disappearance and Destruction coverage parts, in an amount not less than \$250,000 Per Occurrence. The Employee Theft Coverage part should include the Clients' Property Endorsement (ISO Form CR 04 01, or its equivalent).

(h) **Owned, Leased, Rented or Borrowed Equipment:** The Contractor shall maintain Property Coverage for their owned, leased, rented or borrowed equipment, tools, trailers, etc.

(i) **Property Coverage:** The Contractor shall provide coverage for damage to their work, materials to be part of the project (on-site and off-site), and in transit.

Based on the scope and size of a School District project, the School District shall have the right to revise the insurance requirements specified above.

15.1 **Evidence of Insurance Coverage.** Certificates of Insurance evidencing the required coverages and Endorsements must specifically reference the School District Contract

Number set forth on the first page of the Contract (the Contract Number can be typed in the 'Description' section of the certificate). The original Certificate of Insurance and Endorsement shall be submitted to the address below:

School District of Philadelphia
Office of Risk Management
Attn.: Riccardo Zucaro, Director of Risk Management
440 North Broad Street, Suite 325
Philadelphia, Pa 19130-4015
Fax: (215) 400-4591
Phone: (215) 400-4590

with a copy to:

The School District of Philadelphia
Office of Environmental Management and Services
440 North Broad Street, 3rd Floor Portal C
Philadelphia, PA 19130-4015
Attn.: Francine Locke, Director of Environmental Services
(Fax No.: 215-400-4751)

The Certificate of Insurance and the Endorsement must be submitted to the School District at least ten (10) calendar days before any contractual services or Additional Term or renewal begins. The ten (10) calendar day requirement for advance documentation of coverage may be waived in situations where such waiver will, in the sole judgment of the School District Director of Risk Management, benefit the School District. Under no circumstances shall the Contractor actually begin services (or continue services, in the case of renewal or an Additional Term) without providing the evidence of insurance. The School District reserves the right to require the Contractor to provide certified copies of the original policies of all insurance required under this Contract at any time upon ten (10) calendar days written notice to the Contractor.

15.2 Notice of Claim or Lawsuit. The Contractor shall advise the School District in writing, within ten (10) calendar days upon notification of a claim or lawsuit based upon the Contractor's services, omission or breach, that it will abide fully by Paragraph 13.a (*Indemnification*) and Section 15 (*Insurance*) of this Contract, and that the applicable insurance carrier(s) has (have) been advised to defend, indemnify, and hold harmless the School District in accordance with the provisions of Paragraph 13.a (*Indemnification*) and Section 15 (*Insurance*) of this Contract. The Contractor shall not decline to provide the School District with full protection and coverage under Paragraph 13.a (*Indemnification*) and Section 15 (*Insurance*) of this Contract because some other contractor or consultant may, in whole or in part, be responsible for the occurrence, death, injury, damage, or loss to persons or property, or economic loss, damage, or expense, or because the School District may be a co-insured or an additional insured on some other contractor's or consultant's policy of insurance. The Contractor agrees that any violation of this Paragraph 15.2 of Section 15 (*Insurance*) shall be deemed a material breach of this Contract.

15.3 **Self-Insurance.** The Contractor may not self-insure any of the coverages required under this Contract without the prior written approval of the School District Director of Risk Management. In the event that the Contractor desires to self-insure any of the coverages listed above, it shall submit to the School District's Director of Risk Management, prior to the commencement of Services hereunder, a certified copy of the Contractor's most recent audited financial statement, and such other evidence of its qualifications to act as a self-insurer (e.g., state approval) as may be requested by the School District's Director of Risk Management. In the event such approval is granted, it is understood and agreed that the School District, its commission members, board directors, officers, employees and agents shall be entitled to receive the same coverages and benefits under the Contractor's self-insurance program that they would have received had the insurance requirements been satisfied by a reputable insurance carrier authorized to do business in the Commonwealth of Pennsylvania or otherwise acceptable to the School District Director of Risk Management. If at the time of commencement of the Initial Term of this Contract, the Contractor self-insures its professional liability or workers' compensation and employers' liability coverage, the Contractor may, in lieu of the foregoing, furnish to the School District Director of Risk Management and School District a current copy of the State certification form for self-insurance or a current copy of the State Insurance Commissioner's letter of approval, whichever is appropriate. The insurance (including self-insurance) requirements set forth herein are not intended and shall not be construed to modify, limit, or reduce the indemnifications made in this Contract by the Contractor to the School District, or to limit the Contractor's liability under this Contract to the limits of the policies of insurance (or self-insurance) required to be maintained by the Contractor hereunder.

h. *Stoppage or Abandonment.* Add the following subsection 20.b., *Stoppage or Abandonment*, to Section 20., *Termination for Convenience*, page 10, Exhibit "C", the Standard Terms and Conditions:

b. *Stoppage or Abandonment.* The School District may order the Contractor, in writing, to stop or abandon all or any part of its services or work, for the convenience of the School District, or for work stoppages beyond the control of the School District or the Contractor. Any increased costs incurred as a result of the stoppage or abandonment of the services or work shall be an equitable amount determined by the School District and the Contractor in view of all the facts and circumstances. If the work or services is abandoned, the School District shall pay the Contractor for all work or services performed to the date of the abandonment in accordance with Section 20., *Termination for Convenience*, of this Contract.

i. *Suspension for Convenience.* Add the following subsection 20.c., *Suspension for Convenience*, to Section 20., *Termination for Convenience*, page 10, Exhibit "C", the Standard Terms and Conditions:

c. *Suspension for Convenience.* The School District shall have the right, at any time during the term of this Contract, to suspend all or any part of the services, for the convenience of the School District, for the period of time that the School District, in its sole discretion, determines to be in the best interest of the School District, upon fourteen (14) days' prior written notice to the Contractor (except that in the event of a public emergency, as determined by the School District,

no such period of notice shall be required). If a suspension of the services pursuant to this subsection is for greater than thirty (30) days, the Contractor shall have the right to submit a claim to the School District for the payment of costs for all services or work performed in accordance with the provisions of this Contract prior to the effective date of the suspension. The Contractor shall be entitled to a one-day extension of the time of performance provided in this Contract for each day that it is suspended pursuant to this subsection. The School District shall have the right, during the period of any suspension pursuant to this subsection, to terminate this Contract as provided in this Contract.

REMAINDER OF THIS PAGE IS LEFT INTENTIONALLY BLANK.

In witness whereof, the Parties, intending to be legally bound, have executed and delivered this Contract as of the day and year set forth above.

By: _____

Examined and Approved

THE SCHOOL DISTRICT OF PHILADELPHIA

Dawn Renee Chism
Attorney, The School District
of Philadelphia

By: _____
WILLIAM R. HITE, JR. Ed.D.
Superintendent

EXHIBIT "A"

THE SCHOOL DISTRICT OF PHILADELPHIA OFFICE OF CAPITAL PROGRAMS
440 NORTH BROAD STREET, 3RD FLOOR PHILADELPHIA,
PENNSYLVANIA 19130-4015 TELEPHONE (215) 400-4730 /
FAX (215) 400-4731



**REQUEST FOR
PROPOSAL/QUALIFICATIONS
TO PROVIDE
PROFESSIONAL
ENVIRONMENTAL AND SAFETY
MEDICAL SERVICES**

1.0 Subject

The School District of Philadelphia's (District) Office of Capital Programs is requesting proposals to provide "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES" for four (4) fiscal years (July 1, 2018 through June 30, 2022).

The School District of Philadelphia, intends to make awards for professional service contracts to one or more vendors who can provide experienced and quality consulting services firm.
(THE SCHOOL DISTRICT OF PHILADELPHIA RESERVES TO RIGHT TO AWARD THIS CONTRACT IN ITS BEST INTEREST.)

The District was designated a distressed school district on December 21, 2001 pursuant to the Pennsylvania Public School Code (PSC), 24 P.S. §6-691(c). The School Reform Commission (SRC) has been established pursuant to PSC, 24 P.S. §6-696, and is responsible for the operation, management, and educational program of the School District pursuant to PSC, 24 P.S. §6-696(e)(1).

2.0 Place and Date of Submission

One (1) original and four (4) copies each of the Technical Proposal and Fee Proposal shall be submitted in separate sealed envelopes clearly marked: "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES PROPOSAL" and "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES- FEE PROPOSAL" with the name of the proposing firm and their address.

**Faxed and electronically transmitted proposals will not be accepted.
Responses must be received by no later than Monday, April 30, 2018 at 3:00 PM.**

The proposal shall be addressed to:

The School District Philadelphia
Office of Capital Programs
440 North Broad Street, "Portal C" Third Floor
Philadelphia, PA 19130
Attn: Francine Locke, Environmental Director

It is the submitting firm's responsibility to ensure timely delivery of the RFP at the designated location. We strongly urge that proposals be hand delivered to avoid delivery delays within the District's mail room. Failure to meet this deadline, unless extended by the District, will result in immediate disqualification. The District reserves the right to accept RFP responses received after this date and time if it is determined to be in the best interests of the School District to do so.

3.0 Questions and Communications

Please include in all e-mail communications regarding this RFP: "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES" RFP in the e-mail subject.

All questions must be submitted in writing via e-mail to flocke@philasd.org no later than 10:00am on April 20, 2018. The e-mail must include "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES RFP" in the subject line. The District will not be bound by any oral communications. All responses, including addenda to the RFP, will be provided for every inquiry and posted on the District's website just below the advertisement of the RFP. From the date of release of the RFP to the date of authorization of a contract, there shall be no communication concerning the RFP between prospective respondents and/or their agents or staff with any District staff, except as provided in the RFP. Communication with other District staff is expressly prohibited. Any communication in violation of this provision will not be binding on the District and shall be grounds for immediate disqualification.

4.0 Schedule and Milestone Dates:

Deadline for all RFP Questions	April 20, 2018, 10:00am
Answers to questions posted online	April 23, 2018, 5:00pm
Due date for submission of proposals	April 30, 2018, 3:00pm
Anticipated date of contract award by	June 2018
Anticipated effective date of contract	July 1, 2018

5.0 Project Scope

The School District of Philadelphia (SDP) manages a large environmental and safety program. This includes implementing an Employee Medical Surveillance Program that requires certain medical assessments and periodic monitoring of School District of Philadelphia Employees. The SDP intends to contract with Medical Service Provider(s) to provide medical services on an as needed basis for this program. All medical services shall meet all of the applicable requirements of the laws, rules, regulations, standards or guidelines as specified in this Request for Proposal (RFP) and per the attached Table 1: Medical Service Matrix.

In summary, Medical Services to be provided are:

1. Medical Surveillance for Asbestos Workers (OSHA), including
 - Initial Examinations, and
 - Periodic (Annual) Examinations
2. Chest roentgenograms with interpretation and classification (B Reader)
3. Medical Clearance to use Respirator
4. Respiratory Fit Testing (Qualitative and Quantitative)

The School District personnel to receive the Medical Services generally fall within these groups:

- Those who Manage and Implement the District's AHERA Program
- Asbestos Abatement and Lead Abatement Workers and Supervisors
- Designated Facilities, Maintenance and Operations Staff
- Capital Programs Inspectors and Project Managers

This Request for Proposal (RFP) provides interested qualified firms with information enabling them to submit a Service Bid Proposal for providing the Medical Services described herein.

A. Proposal and Qualification Summary

This RFP provides instructions and the requirements for qualified firms to submit a technical proposal and fee proposal to The School District of Philadelphia to provide professional Medical Services for the School District's Environmental and Safety Programs.

To qualify, firms must be accredited, certified or licensed to provide the Medical Services specified in this RFP. For asbestos related Medical Services, this includes providing at least one B-Reader, or and experienced physician with known expertise in pneumoconioses, for roentgenograms interpretation. Firms submitting a proposal must be able to provide or form a team to provide "ALL" of the Medical Services as described in the RFP. If necessary, firms may team with other firms to be able to deliver a full offering. Teaming may be used to comply with the Minority and Women Owned Business Enterprise (M/W/BE) participation goals. If a multi-firm team is proposed then each firm in the team must submit their required qualifications and certifications together as part of a single Technical Proposal.

B. Scope of Services

Qualified firms must provide the Medical Services to School District employees as mandated by various Federal, State, and Local regulatory programs and guidelines as per attached Table 1, Medical Services Matrix. All Medical Services provided shall meet the regulatory requirements and standards referenced in Table 1, including, but not limited to, the Acts, laws, and regulations and all related standards, standard interpretations, rules, guidance, guidelines and programs that require or recommend the Medical Services.

General Requirements

- All examinations and procedures must be performed by or under the supervision of a licensed physician.
- This RFP requires firms to provide the Medical Services in their own facilities and that these facilities are available at a reasonable time and place. The RFP also requires Medical Providers have the capability to provide a mobile medical unit to provide the Medical Services at a District Designated Locations.
- The firm must have an on-going schedule of operation to enable School District personnel to be scheduled to receive for Medical Services at a time and place convenient to the employee. Services at provider's location shall be available within at least 48 hours after making a request for an appointment. If a mobile service unit is requested for a District location, the services shall be scheduled and provided within one month of the initial District request.
- Service providers shall have the capacity to provide medical services for at least 40 employees a day in either their own facilities or a mobile medical unit.
- **It is a requirement for this contract that all records be kept and reported to The School District via secure electronic computer files.**
- The Fee Schedule lists the Medical Services and includes a place for firms to propose unit prices for each of these services. An estimated number of staff per year to receive the services is provided for consideration by the firms providing a proposal. **However, Firms must note that the School District is not committing to, nor guaranteeing any minimum amount of Medical Services to be procured by providing this information.**
- This Section 5.0-B of this RFP, Scope of Services, and the referenced Table 1, will be attached to the executed Agreement for Services. This language from the RFP will be combined with the Contractor's Description of Scope of Services, as provided in their proposal, and will become "Exhibit "A" - the "Contractor's Scope of Services" incorporated in the Agreement for Services.
- Medical Services in Table 1 and the Fee Schedule are anticipated to be required over the first fiscal year of the School District, which is from July 1st to June 30th of the following year. The initial 1-year Contract Term shall begin on the date of the Notice to Proceed and shall continue until the funds are exhausted, or the end of the fiscal year of the School District, unless otherwise noted.
- The School District shall have the option, in its sole discretion, to renew the Service Contract, for up to three (3) additional periods, upon the same terms, fees, conditions and compensation methods specified in Service Contract, the Fee Schedule and the Terms and Conditions of the executed Agreement for Services.
- Medical Service Providers shall organize, secure, and transmit the employee medical records developed under this service agreement in a format so that they may be retained and made available in accordance with 29 CFR 1910.1020.

Services Specific Descriptions and Requirements

Medical Surveillance

The provider shall provide initial and periodic Medical Surveillance examinations according to 29 CFR 1910.1001(1) for each applicable District employee. All medical examinations and procedures must be performed by, or under the supervision of, a licensed physician. An exception is for persons other than such licensed physicians who administer the pulmonary function testing required by this section, these persons must have completed a training course in spirometry sponsored by an appropriate academic or professional institution (the specific institution must be designated on Form S for such personnel).

1. Content and of medical surveillance examinations and consultations shall be as required by 29 CFR 1910.1001(1)(2). These minimum elements shall be required in the medical examinations:
 - a. A medical work history;
 - b. A complete physical examination of all systems with emphasis on the respiratory system, the cardiovascular system and digestive tract;
 - c. The completion of the respiratory disease standardized questionnaire in Appendix D of section 1910.1001, (Part 1 for Initial, Part 2 for Periodical);
 - d. A chest roentgenogram (see additional details below, Chest Roentgenograms with Interpretation);
 - e. Pulmonary function tests to include forced vital capacity (FVC) and forced expiratory volume at 1 second (FEV_{1.0}); (see additional details below - Pulmonary Function Tests); and,
 - f. Any additional tests deemed appropriate by the examining physician.
2. Medical Services providers shall provide the School District written opinions (Written Opinion) for each employee as required by 29 CFR Part 1910.1001(1)(7) Appendix I. A second copy of the written opinions shall be provided to the School District for delivery to the employee. The written signed opinion from the examining physician shall contain the results of the medical examination and shall include the following:
 - a. The physician's opinion as to whether the employee has any detected medical conditions that would place the employee at an increased risk of material health impairment from exposure to asbestos;
 - b. Any recommended limitations on the employee or upon the use of personal protective equipment such as clothing or respirators;
 - c. A statement that the employee has been informed by the physician of the results of the medical examination and of any medical conditions resulting from asbestos exposure that require further explanation or treatment; and
 - d. A statement that the employee has been informed by the physician of the increased risk of lung cancer attributable to the combined effect of smoking and asbestos exposure.
3. The examining physician shall not to reveal in the written opinion specific findings or diagnoses

unrelated to occupational exposure to asbestos.

4. The Service Provider shall deliver a copy of the physician's written opinion to the affected employee within 30 days of the examination. The delivery of the physician's written opinion shall be sent to the affected employee via certified mail, return receipt requested, or by other direct delivery courier that provides a signed proof of delivery. The Service Provider and record receipt.
5. The School District will provide the physician with the information required under this OSHA standard listed at 1910.1001(1)(6), which includes:
 - a. A copy of OSHA standard 1910.1001 and Appendices D and E.
 - b. A description of the affected employee's duties as they relate to the employee's exposure.
 - c. The employee's representative exposure level or anticipated exposure level.
 - d. A description of any personal protective and respiratory equipment used or to be used.
 - e. Information from previous medical examinations of the affected employee that is not otherwise available to the examining physician.
6. Summary Reports of the Medical Surveillance shall be supplied as follows and will contain the following minimum information:
 - a. A quarterly summary report providing the number of employees evaluated with a breakdown of periodic and initial evaluations as well as those with and without Chest Roentgenograms.
 - b. A list in alphabetical order of all employees who received a medical surveillance.

Chest Roentgenograms with Interpretation

1. Medical Services providers shall perform Chest Roentgenograms (posterior- anterior 14 x 17 inches) and interpret and classify as required by 29 CFR Part 1910.1001, Appendix E.
2. Chest roentgenograms shall be interpreted and classified in accordance with a professionally accepted classification system and recorded on an interpretation form following the format of the CDC/NIOSH (M) 2.8 form.
3. Roentgenograms shall be interpreted and classified only by a B-reader, or an experienced physician with known expertise in pneumoconioses.
4. All interpreters, whenever interpreting chest roentgenograms made under this section, shall have immediately available for reference a complete set of the ILO-U/C International Classification of Radiographs for Pneumoconioses, 1980.

Medical Clearance to Use Respirator

The Service provider shall perform a medical evaluation to determine the employee's ability to use a respirator according to the requirements of OSHA 29 CFR 1910.134. All medical evaluations shall be performed by a Physician or other Licensed Health Care Professional (PLHCP).

The medical services for Medical Respirator Clearance shall be provided during the employee's normal working hours or at a time and place convenient to the employee. The Service requirements are outlined below which may augment or refine the OSHA Respiratory Protection standard; however, these services outline shall not reduce or change any requirements of the cited OSHA standard.

1. Provide each employee with an OSHA questionnaire to complete (OR do you want the Physician or other Licensed Health Care Professional (PLHCP) to perform medical evaluations using medical examination that obtains the same information as the medical questionnaire?). The Service provider shall ensure that the employee understands the questionnaire content and to discuss the questionnaire and examination results with the PLHCP as necessary with each employee.
2. Require each employee to complete a respirator user evaluation form to be reviewed by the PLHCP. This form shall be devised to meet the minimum requirements of 29 CFR 1910.134(e)(5), Supplemental information for the PLHCP. This form shall also identify the manufacturers, and model numbers and size of the respirators to be used by the employee.
3. A pulmonary function test (PFT) shall be performed at the time of testing:
 - a. Testing shall be performed by NIOSH accredited technicians of properly licensed and certified physicians.
 - b. The testing shall provide a real time graph chart documentation to be provided to the School District.
 - c. Respirator Medical Clearance must be determined by a Board Certified Occupational Health Physician with a special NIOSH certification for the interpretation of PFT results
4. For every medical evaluation, the PLHCP shall provide a written recommendation regarding the employee's ability to use the respirator. The recommendation shall provide only the following information:
 - a. Any limitations on respirator use related to the medical condition of the employee, or relating to the workplace conditions in which the respirator will be used, including whether or not the employee is medically able to use the respirator;
 - b. The need, if any, for follow-up medical evaluations; and
 - c. A statement that the PLHCP has provided the employee with a copy of the PLHCP's written recommendation.
5. Summary Reports of the Medical Clearance to Use Respirator evaluations shall be supplied as follows and will contain the following minimum information:
 - a. A quarterly summary report providing the number of employees tested for the period and the pass/fail status.
 - b. A list in alphabetical order of all employees who received a respirator medical clearance test and the status of all test results for each employee.

- c. A form depicting status with the board certified occupational health physician's determination of medical clearance shall be provided to the SDP. A copy of the determination form required to be distributed to employees will also be provided. This form shall identify the type, size, manufacturer, and model number of the respirators that the employee is cleared to use.
6. The Service Provider may assume that the SDP will provide a copy of the written respiratory protection program and a copy of OSHA 29 CFR 1910.134(e).

Respirator Fit Testing

1. The Service Provider shall administer an OSHA-accepted Quantitative fit test (QNFT) in accordance to the protocol and requirements of 29 CFR 1910.134 Respiratory Protection paragraph (f), and Appendix A of the same standard. District Specific requirements will be as per the District's written respiratory protection program.
2. Each employee must be fit tested with the same make, model, style, and size of respirator that they were approved to use.
3. A Quantitative Fit Test will be performed in the following manner:
 - a. Positive-pressure check: With the exhaust port(s) blocked, the positive pressure of slight exhalation should remain constant for several seconds.
 - b. Negative-pressure check: With the intake port(s) blocked, the negative pressure of slight inhalation should remain constant for several seconds
 - c. The Medical Service Provider shall ensure that persons administering QNFT are able to calibrate equipment and perform tests properly, recognize invalid tests, calculate fit factors properly and ensure that test equipment is in proper working order.
 - d. The Medical Service Provider shall ensure that QNFT equipment is kept clean, and is maintained and calibrated according to the manufacturer's instructions so as to operate at the parameters for which it was designed.
4. The Rainbow passage shall be used in addition to all other Test Exercises listed in 29 CFR 1910.134 Appendix A and District's written respiratory protection program. The written respiratory protection program tests are:
 - a. Normal Breathing (NB): In the normal standing position, without talking, the subject shall breathe normally for at least one minute.
 - b. Deep Breathing (DB): In the normal standing position, the subject performs deep breathing for at least one minute, pausing so as not to hyperventilate.
 - c. Turning Head Side to Side (SS): Standing up, the subject shall slowly turn his/her head from side to side between the extreme positions to each side. The head shall be held at each extreme position for at least 5 seconds.
 - d. Moving Head Up and Down (UD): Standing up, the subject shall slowly move his/her head up and down between the extreme position straight up and the extreme position straight

down. The head shall be held at each extreme position for at least 5 seconds.

- e. Jaw Movements (JM): The subject will be asked to perform some jaw movements during this test.
5. The Results of the Fit Testing shall be reported as follows:
- a. The name or identification of the employee tested.
 - b. Confirm the type of fit test performed (must be QNFT) and method and test equipment used.
 - c. The specific make, model, style, and size of respirator tested;
 - d. Date of test;
 - e. Identification of all the Test Exercises performed;
 - f. The pass/fail results and strip chart recording or other recording of the QNFTs test results.
6. For employees that pass the fit test, an identification card shall be issued by the Medical Provider. The Respirator Fit Test ID Card shall include the following:
- a. The Fit Testing information as listed in 5.a. through 5.d. above, plus,
 - b. The name or unique identification number of the person who administered the fit test.
 - c. The name and/or logo of the Medical Provider.
 - d. The Respirator Fit Test ID Card shall be no larger than the size of a standard credit card, no smaller than a standard business card and include tamper proof laminated protection.
7. Summary reports of the Respirator Fit Testing evaluations shall be supplied as follows and will contain the following minimum information:
- a. A quarterly summary report providing the number of employees Fit Tested for the period and the pass/fail status.
 - b. A list in alphabetical order of all employees who received a respirator fit test and the status of all test results for each employee.

6.0 Proposal Requirements

This section describes how to prepare a proposal and lists the required contents of a qualified proposal.

A. Proposal Format and Outline

- Form of Proposal: Firms must submit both a Technical Proposal (1 original, 3 copies) and a separate Fee Proposal (1 original). See 2.0 (Place and Date of Submission) for details.

- **Technical Proposals:** The Technical Proposal must contain the information described in more detail in items B to D below. Each section must be separated by indexed tabs for easy reference. In addition to a table of contents, the Proposal shall be organized into the following sections and contain the following information:
 1. Cover Letter.
 2. Medical Services Provider Description of Scope of Services.
 3. Background of the Firm.
 4. Summary Qualifications of Principals and Key Personnel (Form S)
 5. Supporting Information: Resumes, Required Forms, and Certificates.
- The Technical Proposal must be presented with all requested information as described in subsections B through D and must be signed by a principal member of the firm.
- **Cover Letter:** The cover letter must be signed by a person of the Firm who is duly authorized by the Firm to (a) commit resources of the firm to provide the Medical Services described in this RFP, and (b) to execute a Service Contract with the School District of Philadelphia to provide the Medical Services described in this RFP.

The cover letter must include a statement certifying that the proposing firm can, and will, meet the insurance requirements as described in this RFP and the attached "Exhibit C". Selected Medical Service firm(s) will be required to submit a Certificate of Insurance which specifically names the School District of Philadelphia and The School Reform Commission as additional insured.

The cover letter must include a statement certifying that the Medical Service firm will accept the School District Standard Terms and Conditions as provided in "Exhibit C" attached to this RFP.

B. Medical Services Provider's Description of Scope of Services

- The Proposal shall include a description in clear and precise terms of the Medical Service firm's understanding of the scope of work for this project. Include a narrative and description of the proposed effort and the Medical Services that will be provided.
- Outline your understanding of this project, scope of services, technical plan and organization. List, in detail, the full scope of services you intend to provide, as listed under Section 5.0, to achieve a successful completion of this program.

C. Background of Firm and Key Personnel

- The Medical Service firm responding to the RFP must prepare and submit a Form X and Form S to provide the background and experience of the Firm and Key Personnel and Summary Qualifications of Principals and Key Personnel. The following information must be included:
 1. Indicate the number of years the firm has been in business and providing Medical Services as an individual owner or partnership

2. List the principal owner(s) of the firm and their professional background and resumes.
 3. List Key Personnel of the firm who are proposed to provide Medical Services under this services agreement.
- Form X shall be the first page presented in this section. Other information regarding the firm's qualifications and experience, if provided, may be included in this section following the completed form(s). Additional information shall be limited to 15 pages.
 - Names and summary qualifications of principals and key personnel of the firm are listed in the background Form X. The detailed qualifications for these personnel are to be presented as per the next section. (A Form S must be provided for each person listed on Form X).
 - An Organization Chart showing the proposed Medical Service Providers, Key Personnel and Principals for this Medical Services project. If a multi-firm Team is proposed, the chart must show the management approach and reporting relationships between the firms.

D. Personnel and Consultants – Qualifications and Experience

- Proposing firms must provide a Summary Qualifications for each Principal/Key Personnel and/or Proposed Medical Services provider who will participate in, and be assigned to, this Service Contract.
- The provided Forms S must be completed and submitted to summarize qualifications, licensing, certifications and training required to provide the Medical Services for this contract.
- It is optional to provide additional resume information in the firm's standard format to support the Summary Qualification Form. These should be arranged after each Summary Qualifications Form.
- Please note that personnel not presented in the proposal will not be qualified to provide services until a similar Summary Qualifications (such as a Form S) are presented and accepted by the School District. Any invoice containing charges for services provided by personnel not previously qualified in this manner will be rejected and returned for correction and resubmission.
- Experience in occupational health relating to asbestos is of particular interest for the purpose of evaluating prospective Medical Services firms. The School District reserves the right to discuss the qualifications and experience listed on the submitted forms.

7.0 Fee Proposal

Firms responding to the RFP shall complete and return a separate fee proposal in a separate sealed envelope at the same time as their technical proposals. **If it is deemed to be in the best interest of the District, the District may select one or more vendors for these services. In addition, the District does not guarantee any amount or percentage of the work to any vendor.**

All fees are to be provided on the "fee template" provided (Attachment H) in this RFP. All fee line items

must be completed and no changes, deletions or exceptions to the fee schedule will be accepted.

All proposed fees should cover all related overhead, profit, supplies, materials, travel, etc., for performance of work required.

FEE SCHEDULE (ATTACHMENT H) - The information requested in this section is for THE SCHOOL DISTRICT OF PHILADELPHIA's use only. These schedules will be used for evaluation and not as the sole criteria for an award. This portion of the proposal must be bound and sealed separately from the remainder of the proposal and both are to be received by the submission deadline.

Information for the cost and price analysis evaluation must be submitted on the completed cost breakdown form(s) and fee schedules included in this RFP/RFQ. Only one (1) price per line item is permitted.

All fees are to be based on each unit identified as Per Hour, Per Day, Per Week and/or Per Sample as listed in the fee schedule.

Respondents are not permitted to place minimum or maximum values to any line item listed in the fee schedule.

Rates and costs provided on the form(s) should cover all related overhead, profit, supplies, materials, travel, etc., for performance of work required. Request for compensation beyond that stated on the Cost Breakdown form will be rejected. Costs shown on the Cost Breakdown form(s) will remain firm and fixed for the duration of this contract except that costs shown will increase or decrease each year in accordance with the CPI-U Index. Prices for each of the option years will be adjusted (increased or decreased) according to the corresponding increase or decrease in the CPI-U Index "All Urban Consumers, All Items, Philadelphia, Wilmington, Atlantic City, PA-DE-NJ-MD" for the previous twelve month period from April to April.

7.1 Personnel

List individuals from your company (with employment history) who will be working on District projects. For each individual, provide a brief resume that includes the following: Education, Experience, Certification(s), and the responsibilities each will be assigned. A copy of any Employee Certifications and all Laboratory Certifications should be included along with other documentation.

8.0 Evaluation Criteria

The selection committee will review all RFP submittals and assign a technical score based on the evaluation criteria and the weighting for each section described, including:

- a. Qualifications of the personnel and education of the key team members to provide the services being proposed.
- b. Proposer's ability to responsibly manage the completion of the proposed programs.
- c. Ability to support meeting M/WBE goals for the project as a whole.
- d. Extent and depth of experience specific to : "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES PROPOSAL" as outlined in the Scope section of this RFP.
- e. Level of client satisfaction determined from supplied references (5 minimum)
- f. Quality of proposal depth response to Section 5.0, Project Scope.

9.0 Selection Procedure

The District is following a two-stage qualifications-based-selection (QBS) process for this solicitation (sometimes referred to as the Brooks Act process). The District may at any time terminate the RFP process provided for herein for any reason or no reason in the sole discretion of the School District. The receipt of proposals or other documents by proposers during any state of the RFP process will in no way obligate the School District to enter into any agreement with any proposer or make the District liable for any proposer costs.

Stage 1:

Step 1: Technical proposals of firms will be evaluated by the selection committee and ranked on the basis of their technical qualifications and suitability for this assignment.

Step 2: A limited number of firms (to be determined by the District) with the highest rated technical proposals will be invited to interviews and oral presentations with the selection committee.

Each technical proposal will be reviewed by a selection committee to determine responsiveness. Proposals deemed non-responsive will be rejected without evaluation. The District reserves the right to reject any or all proposals when such rejection is in the best interest of the District. A responsible proposal is complete and addresses all requirements of the RFP. The District reserves the right to waive any informalities and technicalities in the RFP process or any non-material defects in proposals.

If for any reason whatsoever, the District rejects the proposer's proposal, the proposer agrees that it will not seek to recover lost profits on work not performed nor will it seek to recover its proposal preparation costs. By submitting its proposal, the proposer expressly states that it intends to be legally bound and accepts the limitation of remedies set forth in this paragraph. By submitting its proposal, the proposer further expressly states that should it file, initiate, or persuade another to file, initiate or in any other manner pursue or encourage any lawsuit or that such filing, initiating, or other pursuit constitutes a breach of its agreement with the District and that it will be liable for damages incurred by the District arising from the breach of this agreement including, but not limited to, the District's attorneys' fees and costs of defending such action.

The District may at any time terminate the RFP process provided for herein for any reason or no reason in the sole discretion of the District. The receipt of proposals or other documents by proposers during any state of the RFP process will in no way obligate the District to enter into any agreement with any proposer or make the District liable for any proposer costs. The District may alter these and any other procedures, as it deems necessary and appropriate. The District will evaluate all proposals based on a number of factors to determine what is in the best interests of the District.

If the selected firm(s) are approved by the School Reform Commission, the District will notify the successful proposer(s) of the award and prepare and distribute the necessary contract documents for execution. The unsuccessful proposers will be notified by letter after the awarding of the contract.

Technical proposals shall provide the following required information and adhere to the following organization in the proposal by providing **tabs** for sections listed below as noted.

Tab 1 – Cover Letter, Table of Contents and Legal Structure of Firm

- Provide a cover letter that references the RFP and confirms that all elements of the RFP have been read and understood. The cover letter shall be signed by an individual authorized to contractually bind the proposer and shall include Attachment F (Acceptance of Terms and Conditions of the Contract). In the event that the firm does not provide signed and sealed Attachment F, the District will deem the firm's proposal non-responsive to the RFP.
- Identification of the legal structure of the firm, or consortium of firms, making the proposal. Discuss the organizational structure for the project, the management approach and how each partner and major subcontractor in the structure fits into the overall team.
- Table of Contents

Tab 2 – Experience

Provide the following specific information:

- “: “PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES PROPOSAL” program management projects for similar organizations. (minimum 3 projects).
- Sample reports
- An outline of how firm will implement items in section 5.0

Tab 3 – Project Organization, Personnel Experience, and Qualifications

Define the key personnel who will perform the tasks outlined in the scope of this RFP, the decision-making ability in the process, and the qualifications of the key personnel. At a minimum, include the following:

- Organization Chart to include key personnel responsible for completing all tasks of this RFP as outlined in the Scope.
- Key personnel experience and educational requirements.
- “Certificate of Authorization” from the State granting the authority of the proposing Laboratory firm to provide analytical services in the Commonwealth of Pennsylvania.
- Three references of clients similar in scope to the requirements of this RFP with other school districts. (Do not list School District of Philadelphia references).

Tab 4 – Project Schedule and Plan

Provide a conceptual schedule and plan that includes the following:

- Medical Evaluationa Events
- Sample Reports
- Data Management and communication with District
- Final Report submission

Tab 5 – Proof of Current Insurance Coverages

The firm shall provide a Certificate(s) of Insurance reflecting current insurance coverage of the firm for the following:

- Workers' Compensation and Employees' Liability Insurance
- Commercial General Liability Insurance
- Automobile Liability Insurance
- Professional Liability Insurance
- Excess Umbrella Insurance

Successful proposer(s) must provide evidence of current insurance coverage prior to the execution of the Contract for "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES" firm. The amounts and types of such insurance coverage are as followed and as indicated in the consulting services sample Contract that will be posted with this RFP.

Tab 6 – Good Standing or Subsistence Certificate

All firms must submit a copy of their firm's Good Standing or Subsistence Certificate issued by the Pennsylvania Department of State, Corporation Bureau. You can contract the Corporation Bureau at (717) 787-1057 or you can go online and order the Certificate. You may have to register your company before ordering.

Tab 7 – Completed Executed Attachments

The RFP proposing firm shall complete attachments as follows:

1. Attachment A – Complete the Disclosure of Ownership form.
2. Attachment B – Equal Opportunity
3. Attachment C – Review and sign the Anti-Discrimination Policy.
The proposer shall not discriminate in employment and shall abide by all anti-discrimination laws.

4. Attachment D – MBE/WBE Participation Plan
5. The MBE/WBE Participation Goal will be set for the entire duration of the project. See Attachment “C”, ANTI- DISCRIMINATION POLICY, for details. Proposers must complete and sign Attachment “D”, MBE/WBE Participation Plan. Proposers shall identify the specific firms that make up its commitment to the percentage goals stated. Do not put TBD (to be determined) for M/WBE participation goals. Goals are scored by the % provided in Attachment “D”, M/WBE Participation Plan of your Proposal.
6. Attachment F – Acceptance of Terms and Conditions of the Contract
In the event that the firm does not provide signed and sealed Attachment F, the District will deem the firm’s proposal non-responsive to the RFP.
7. Attachment G – City of Philadelphia Tax Compliance Certificate
The District will not enter into a contract with a firm, business, or other legal entity that has not submitted a copy of its “Certificate of Tax Clearance” with the City of Philadelphia to the District. See the attachment for the City of Philadelphia website to obtain the certificate and the City of Philadelphia Department of Revenue Tax Clearance Unit phone number.
8. Attachment H- Fee Schedules for: “PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES PROPOSAL”. (Must be separate from proposal)

Tab 8 – Acknowledgement of Receipt of Addenda (if any)

The firm will acknowledge and list the number of addenda received.

Tab 9 – Company’s Financial Statements

The proposing firm must provide a copy of the most current financial statement. Audited financial statements are preferred. If not available, provide reviewed financial statements or compilation.

Table 1: Medical Services Matrix (RFP Exhibit "A")

Service ID	Service Description	Regulatory Basis, Additional Requirements and Documentation
AME-I	Asbestos Examination	<p>Basis: Occupational Safety and Health Standards 29 CFR Part 1910.1001 (1)(2), Pre-placement examinations.</p> <p>Standard: 29 CFR Part 1910.1001 Appendix D Medical questionnaires; Mandatory, Initial Medical Questionnaire</p> <p>Documentation: Physician's Written Opinion and Quarterly Summary Report</p>
AME-P	Asbestos Medical Examination, Periodic (annually)	<p>Basis: Occupational Safety and Health Standards 29 CFR Part 1910.1001 (1)(3), Periodic examinations.</p> <p>Standard: 29 CFR Part 1910.1001 Appendix D Medical questionnaires; Mandatory, Periodic Medical Questionnaire</p> <p>Documentation: Physician's Written Opinion and Quarterly Summary Report</p>
CXR	Chest Roentgenograms: Taking, printing and Interpretation and Classification Chest Roentgenograms	<p>Basis/Standard: 29 CFR Part 1910.1001 Appendix E</p> <p>Requirements: Roentgenograms shall be interpreted and classified only by a B-reader, or an experienced physician with known expertise in pneumoconiosis</p> <p>Roentgenograms shall be conducted in accordance with 29 CFR 1910.1001(1)(3)(ii) and Table 1 – Frequency of Chest Roentgenogram thereof.</p> <p>Documentation: CDC/NIOSH (M) 2.8 form and Quarterly Summary Report</p>
RMC	Initial Respirator Medical Clearance	<p>Basis: CFR Part 1910.134</p> <p>Documentation: PLHCP Written Recommendation and Quarterly Summary Report</p>
RFT	Respirator Fit Test	<p>Basis: CFR Part 1910.134(f),</p> <p>Standard: Appendix A to 29 CFR Part 1910.134</p> <p>Documentation: Laminated Identification Card and Quarterly Summary Report</p>

ATTACHMENT "A"

**DISCLOSURE OF OWNERSHIP
FOR PROFESSIONAL AND CONSULTING SERVICES**

All businesses submitting proposals are required to complete the appropriate portion of this form. If more space is needed attach additional pages. In submitting its proposal, of which this Disclosure of Ownership form is a part, the business certifies that the information submitted in this Disclosure of Ownership form is correct as of the date of the submittal of the proposal.

1. If the business is a corporation, check here and complete the following:

If the shares of the Corporation are not listed on the New York Stock Exchange or any regional exchange, list the names of each person who possesses either normal or beneficial ownership of 5% or more of the Corporation's stock (listed below). If none, type or print "none" in space below.

Is the Corporation listed on the New York Stock Exchange? yes no

If the Corporation is listed on an exchange other than the NYSE, list the name of the exchange

Name

% Interest

2. If the business is a partnership, check here and complete the following:

The name of each general, limited or individual partner entitled to receive 5% or more of the profit derived from partnership activities (list below). If none, type or print "none" in space below.

Name

% Interest

3. If the business is a sole proprietorship, check here and complete the following:

The name of each person other than the owner entitled to receive 5% or more of the profits derived from the activities of the business (list below). If none, type or print "none" in space below.

Name

% Interest

This form is completed and certified as accurate by:

Signature: _____

Title: _____

Date: _____

ATTACHMENT "B"

**EQUAL OPPORTUNITY NON-DISCRIMINATION IN
HIRING NON-DISCRIMINATION IN CONTRACTING**

NOTICE

1) The successful Proposer shall not discriminate nor permit discrimination against any person because of race, color, religion, age, national origin, ancestry, creed, handicap, sexual orientation, union membership, disabled or Vietnam era veteran status, in the performance of the contract including but not limited to, preparation, manufacturer, fabrication, installation, erection and delivery of all supplies and equipment. In the event of receipt of such evidence of such discrimination by the successful Proposer or its agents, employees or representatives, District shall have the right to terminate the Contract. In the event of the continued refusal on the part of the Proposer to comply with this anti-discrimination provision, the Proposer may be removed from the list of approved bidders of District

2) The successful Proposer agrees to include subparagraph (1) above with appropriate adjustments for the identity of the parties in all subcontracts, which are entered into for work to be performed pursuant to the Contract.

(seal) (Trade Name of Firm)

(seal) (Signature of Owner or Partner)

(Date)

ATTACHMENT "C"

ANTI-DISCRIMINATION POLICY of the SCHOOL DISTRICT OF PHILADELPHIA ADOPTED NOVEMBER 14, 2007

SECTION 1. THE POLICY

It is the policy of the School District of Philadelphia (the "District") acting through and by the School Reform Commission (the "SRC") to ensure equal opportunity in all contracts let by the District (the "Contracts"). In light of this policy, the District has adopted this Anti-discrimination Policy (the "Policy") which is applicable to all Contracts, including but not limited to, Contracts for the design, development, construction, operation and maintenance of school buildings and other buildings and structures owned, leased or used by the District or its contractors, assignees, lessees and licensees (the "Facilities"); Contracts for professional services and Contracts for the purchase of goods, services, supplies and equipment for the District and the Facilities. The objective of the Policy is the promotion of prime contract and subcontract opportunities for minority and woman-owned business enterprises ("M/W/BEs") that are approved by the District or that are certified by the Minority Business Enterprise Council of the City of Philadelphia, Southeastern Pennsylvania Transportation Authority or any other certifying agency designated by the District in its discretion.

The fundamental requirement of the Policy is that all contractors, vendors and consultants that contract with the District (the "Contractors"), satisfy the District that they will: (1) not discriminate against any person in regard to race, color, religion, age, national origin, sex, ancestry, handicap or disability; and (ii) provide a full and fair opportunity for the participation of M/W/BEs in Contracts. Contractors must demonstrate that the participation of M/W/BEs is "meaningful and substantial" in all phases of a Contract under criteria adopted by the District. "Meaningful and substantial" shall be interpreted by the District as meaning the range of participation that reflects the availability of bona fide M/W/BEs in the Philadelphia Metropolitan Statistical Area. Participation shall be measured in terms of the actual dollars received by M/W/BEs.

As used in this Policy, the word "Contractors" includes any person, firm, partnership, non-profit corporation, for-profit corporation, Limited Liability Company or other legal entity that contracts with the District.

For purposes of this policy, "minority person" refers to the following: African American or Black (persons having origins in any of the Black racial groups of Africa); Hispanic American (persons of Mexican, Puerto Rican, Cuban, Dominican, Central or South American, or other Spanish or Portuguese culture or origin regardless of race); Asian American (persons having origins from Japan, China, Taiwan, Korea, Burma (Myanmar), Vietnam, Laos, Cambodia (Kampuchea), Thailand, Malaysia, Indonesia, the Philippines, Brunei, Samoa, Guam, the U.S. Trust Territories of the Pacific Islands (Republic of Palau), the Commonwealth of the Northern Marianas Islands, Macao, Fiji, Tonga, Kiribati, Juvalu, Nauru, Federated States of Micronesia, Hong Kong, India, Pakistan, Bangladesh, Bhutan, the Maldives Islands, Nepal or Sri Lanka); and Native Americans (which includes persons who are American Indians, Eskimos, Aleuts or Native Hawaiians).

SECTION 2. PROCEDURES FOR IMPLEMENTATION

1. Articulation of the Policy, Staffing and Reporting

The Office of General Counsel and Office of Small Business Development will develop language to be included in bid solicitations and requests for proposals that clearly sets forth the objective of the Policy (the "Solicitation Language"). District employees shall include the Solicitation Language in all bids, public solicitations, requests for proposals and all communications to potential Contractors, including those who wish to provide professional services to the District. The Policy shall be articulated to the public in general, and to each Contractor, assignee, lessee or licensee doing or seeking to do business with the District. The District may employ additional staff or contract with other public or private entities to assist in the implementation of the Policy. SBD shall provide the SRC with annual reports on the level of M/W/BE participation in all contracting activities.

2. Promotion of M/W/BEs

The District recognizes the importance of having meaningful and substantial M/W/BE participation in all Contracts. To that end, the District will take steps to ensure that M/W/BEs are afforded a fair and equal opportunity to participate. Those steps may include but are not limited to: (i) making public contracting opportunities; (ii) advertising in newspapers and periodicals published by community-based organizations and M/W/BEs; and (iii) designing bid packages in such a way as to promote rather than discourage M/W/BE participation.

3. Contracting Requirements

a. Bids, Request for Proposals, and Public Solicitations

Prior to the dissemination of any bid, request for proposals or public solicitation (the "Solicitation"), the applicable contracting department of the District shall submit proposed ranges of M/W/BE participation in the area to be bid (the "Participation Range") to SBD for approval. The Participation Range, as approved by SBD, shall be included in each Solicitation and, if applicable, the Solicitation shall include the names and addresses of bona fide M/W/BEs that are available for contracting or joint-venture opportunities. Each bidder or respondent shall be required to submit: (i) a plan with its bid or proposal that meets the Participation Range set forth in the Solicitation and lists the names, addresses, dollar amounts and scope of work to be performed by M/W/BEs (the "Participation Plan"); or (ii) brief narrative explaining its reasons for not submitting a Plan that meets the Participation Range set forth in the Solicitation. Submission of the Participation Plan is an element of responsiveness. Failure to submit a completed Participation Plan or a narrative explaining the reasons that the Participation Ranges could not be met may result in the rejection of a bid or proposal. If the Participation Range in a bid or proposal meets or exceeds the level determined by the District to be meaningful and substantial, there shall be a presumption of compliance with the Policy. If, however, the proposed Participation Range falls below the level determined by the District to be meaningful and substantial, the bidder or respondent must prove to the satisfaction of the District that it did not discriminate in the solicitation of potential subcontractors and/or joint venture partners.

b. Contracts for Professional Services

Contracts for professional services that are not the subject of a Solicitation must also include approval Participation Plans. If a proposed Contract for professional services is subject to the approval of the Limited Contracts Authority Committee of the District (the "LCA"), the applicable contracting department shall submit a proposed Participation Plan for the written approval of SBD prior to the submission of the Contract to the LCA. In instances where proposed Contract for professional services must be approved by a Resolution adopted by the SRC, SBD's approval of the Participation Plan shall be incorporated into the on-line resolution process prior to the submission of Resolution to the SRC.

4. Sanctions

The Participation Plan shall be a part of each Contract between the District and a Contractor and shall be enforceable as any other contractual term or condition. Sanctions for breach of a Participation Plan may include suspension, cancellation of the Contract and/or disbarment from future contracting opportunities with the District.

EQUAL OPPORTUNITY

A. EQUAL OPPORTUNITY

The School District of Philadelphia (the "School District") is an Equal Opportunity Employer and demands no less of the companies with which it does business. The School District will not do business with companies or persons who unlawfully discriminate on the basis of race, color, national origin, sex, creed, disability, or any other impermissible ground in their hiring, promotion, subcontracting or procurement practices. By submitting any proposal to contract or entering into any contract with the School District, the Respondent (the "Respondent") represents and certifies that Respondent is an Equal Opportunity Employer; and conducts business affairs without improper regard to race, color, national origin, sex, creed, or disability, and has not been debarred, suspended, or declared ineligible to contract by any public or private agency or entity because of the Respondent's discriminatory practices. If the Respondent has been debarred or suspended, Respondent must submit a statement with the bid identifying the debarring or suspending entity and giving the date that the debarment or suspension was or is scheduled to be lifted. All certifications contained in a Respondent's proposal are material representations of fact upon which reliance will be placed if the School District awards a contract pursuant to this Request for Proposals. If it is later discovered or determined that the Respondent knowingly rendered an erroneous certification, then the School District may pursue available remedies, including termination of the contract.

B. NON-DISCRIMINATION

1. Non-Discrimination in Hiring

The Respondent agrees that it will comply with provisions of the Philadelphia Fair Practices Ordinance administered by the Human Relations Commission of the City of Philadelphia, the Pennsylvania Human Relations Act. No. 222, October 27, 1955, as amended, 43 P.S. Section 951 et seq; Title 7 of the Civil Rights Act of 1964, 42 U.S.C. Section 2000 et seq., and all pertinent regulations adopted pursuant to

the foregoing in providing equal employment opportunities in connection with all work performed by it pursuant to any contract awarded to Respondent, (the "Contract"). The Respondent therefore agrees:

- (a) That it will not discriminate nor permit discrimination by its agents, servants or employees against any employee or applicant for employment with regard to hiring, tenure or employment, promotion, or any other terms, conditions or privileges of employment because of race, color, sex, religion, age, national origin, sex, ancestry, handicap or disability and will move aggressively as is hereinafter set forth to prevent same.
 - (i) In all publications or advertisements for employees to work at the job site covered by the Contract placed by or on behalf of the Respondent, the Respondent will state that all qualified applicants will receive consideration for employment without regard to race, color, religion, age, national origin, sex, ancestry, handicap or disability.
 - (ii) The Respondent will notify each labor union or workers' representative from whom it seeks workers of the Respondent's commitment as set forth in its proposal, and request that each union or workers' representative include minority group members and women among its referrals.
 - (iii) The Respondent will hire minority and female workers for the skilled and unskilled jobs required to perform the Contract in proportion to their availability in the relevant labor pools in the Philadelphia Metropolitan Statistical Area, or to their availability in its qualified applicant pool, whichever is greater.
 - (iv) The Respondent will post in conspicuous places available to its employees and to applicants for employment, a notice of fair practices to be provided by the Philadelphia Human Relations Commission.
 - (v) The Respondent will maintain a work environment free of harassment, intimidation and coercion, and will ensure that all on-site supervisory personnel are aware of and carry out Respondent's obligation to maintain such a working environment.
- (b) That it will identify on each certified payroll form submitted to the School District those of its employees who are minority group members and those who are female. As used here, "minority" means African American, Hispanic, Asian, or Native American. The School District shall at all times have access to work site and to the Respondent's employment records to assure compliance with this subsection.
- (c) That it will maintain on forms to be supplied by the School District, the name, race, sex, national origin, skill or craft, address, telephone number, and source of referral of each applicant for employment, which record shall show which applicants were hired.
- (d) That in the event apprentices are hired in any skilled craft area, the Respondent will endeavor to hire equal numbers of culturally diverse male and female trainees in each skill area.

2. Non-Discrimination in Contracting

It is the policy of the School District of Philadelphia, that business concerns owned and controlled by minority group members and women shall have full and fair opportunity to participate in performance

of contracts let by the School District. A Respondent's plan to joint venture with or subcontract to minority and woman-owned firms (M/WBEs) and/or to utilize M/WBEs as sources of supplies, equipment, or services will be a significant part of the evaluation of the Respondent's responsibility.

- (a) The Respondent will consider all proposals from potential M/WBE firms and document on the forms supplied by the School District, the reasons for not entering into a joint venture or subcontract with a M/WBE.
- (b) Respondent to this RFP shall employ the services of Sub-consultant(s), as necessary, to achieve combined Minority Owned Business Enterprise (MBE) and Woman Owned Business Enterprise (WBE) participation goals in a range of 15%-20% of the total amount of services provided. If the Firm is a MBE or WBE firm, then the Firm will have achieved the goal for that category. A non-MBE or WBE firm shall employ a MBE or WBE firm to achieve these goals.**
- (c) The Respondent's agreement to meet the requirements of the Section is a material representation of fact upon which reliance will be placed if a contract is awarded. If it is later determined that the Respondent has not made a good faith effort to comply, within the School District's sole judgment, the School District may pursue available remedies, including suspension or debarment of the Respondent from future School District work as non-responsible.

Liability of Subcontractors

Any subcontractor of the Respondent shall have the same responsibilities and obligations as the Respondent to comply with the provisions of this Section and shall be subject to the same penalties for failure to comply as set forth below.

3. Penalties for Failure to Comply

It is hereby agreed that failure to comply and demonstrate a good faith effort to comply with the foregoing requirements shall constitute a substantial breach of the Contract.

(seal) (Trade Name of Firm)

(seal) (Signature of Owner or Partner)

(Date)

ATTACHMENT "D"

**SCHOOL DISTRICT OF
PHILADELPHIA OFFICE OF
PROCUREMENT SERVICES**

MINORITY/WOMAN-OWNED BUSINESS ENTERPRISE (MWBE) PARTICIPATION PLAN FORM

I. Information in this section refers to the Prime Contractor/Vendor.

Company Name _____
Contact Person: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Fax: _____
E-mail: _____
Owner: African-American, Hispanic, Asian, Native American, Woman,
 Non-Profit, Caucasian, Other
Federal Tax ID _____ Certifying Agency: _____
Certification No.: _____
Bid Number or Subject of Resolution: _____

II. Information in this section refers to MWBE firms to be used in the performance of this contract.

Company Name _____
Contact Person: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Fax: _____
E-mail: _____
Owner: African-American, Hispanic, Asian, Native American, Woman,
 Non-Profit, Caucasian, Other
Federal Tax ID _____ Certifying Agency: _____
Certification No.: _____
Description of Work:

Dollar Value \$ _____
Percentage of Total Contract _____
Vendor Signature _____

If no commitment, give reasons and supporting documentation (e.g., evidence of contacting M/WBEs).

I certify that the information provided is true and correct: _____
Authorized Representative

Date: _____

Rev. 01-12

ATTACHMENT "E"
"PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES PROPOSAL"

The : "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES PROPOSAL" Contract shall serve as a "sample" document for the Firms to review. Said "sample" contract shall not be construed as a contract between the Firm and the District.

The Sample Contract will be posted on the website for this RFP.

ATTACHMENT "F"

**ACCEPTANCE OF TERMS AND CONDITIONS OF CONTRACT FOR
"PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES PROPOSAL"**

I have read the *"The "PROFESSIONAL ENVIRONMENTAL AND SAFETY MEDICAL SERVICES PROPOSAL" Contract"* and agree to enter into a Contract for this Project under the Terms and Conditions of the CONTRACT and will not take any exceptions to the Terms and Conditions.

Firm Name: _____ Corporate Seal: _____ Affix Here

Signature: _____ Title: _____ Date: _____
(Principal/Owner)

ATTACHMENT "G"

**TAX COMPLIANCE
WITH THE CITY OF PHILADELPHIA**

Provide a copy of your firm's "Certificate of Tax Clearance" with the City of Philadelphia.

You can search your firm's tax compliance at the following website:

<https://secure.phila.gov/revenue/TaxCompliance/Header.aspx>

If your firm is compliant, you can print out the "Certificate of Tax Clearance".

If your firm is not tax compliant, please contact the City Revenue Department Tax Clearance Unit at (215) 686-6565.

ATTACHEMENT "H" (RFP Exhibit "B") – Fee Schedule

Proposal must include a fee per each unit price listed below

A proposed fee must be provided at each \$ sign to be deemed a complete fee proposal

ID	Medical Service	Provider Location	Estimated* Deliverables or Patients/Year	District Location**
AME-I	Asbestos Examination – Initial	\$	10	\$
AME-P	Asbestos Examination – Periodic	\$	120	\$
CXR	Chest X-Rays	\$	90	\$
RMC	Respirator Medical Clearance Initial Clearance	\$	100	\$
RFT	Respirator Fit Test	\$	130	\$
CE-1	Combined Examination 1 AME-I + CXR + RMC + RFT	\$		\$
CE-2	Combined Examination 2 AME-P + CXR + RMC + RFT	\$		\$
CE-3	Combined Examination 1 AME-P + RMC + RFT	\$		\$
OS-M1	Mobilization Charge per District Location Transportation and Set-up Charge	N/A	1	\$
OD-DC	Daily Charge for Equipment and Personnel <i>Per Diem Charge to Provide Medical Services at a District Location Inclusive of all Equipment, Medical Personnel, Supplies, and Expenses</i>	N/A	2	\$
QSR	Quarterly Summary Report (one report for all services)	\$	4	N/A
RFTID	Respirator Fit Test ID Card	\$	130	N/A

* The estimated number of medical service patients are provided here for proposal information only. These estimates are not binding in any way and shall not represent or imply minimum total annual fee.

This fee table is a tool to submit cost proposal and for the District to evaluate a proposal, it is not a binding agreement. It shall not be interpreted as a commitment to purchase, or contract to procure any implied total amount of medical services.

** Please submit proposed fees for providing these medical services On-Site at a location designated by the District. The District may choose to conduct medical services at the same location and time as a group receives required annual training. Medical Provider shall provide staff and equipment and mobile facilities capable of servicing up to 40 people per day.

FORM X – BACKGROUND OF FIRM AND KEY PERSONNEL

This form must be used to submit required Background Information regarding the Medical Services Firm submitting a proposal.

Firm Name: _____ (full legal name)

1. Indicate the number of years the firm has been in business and providing Medical Services as an individual owner, corporation or partnership: _____ years
2. List principals or owner(s) of the firm and provide information in the following table.

Principal Name/Title	Educational Degree(s)	Medical Degrees and/or Certifications	Years of Technical Experience	Years with the Firm

3. List Key Personnel of the firm who are proposed to participate in providing Medical Services under this agreement. Participation may include actually providing the services, or other organizational, professional or administrative duties.

Key Personnel Name	Educational Degree(s)	Certifications (list CIH, CSP, etc.)	Years of Technical Experience	Will be an Instructor (Y/N)

“Principals” are those individuals in a firm who are full-time and have responsibilities for its business enterprise, profitability, and satisfying commitments of this Medical Services agreement. Principals may have the official Title and Role as an Officer of the Firm, or be listed Principal, Partner, or Associate in the firm’s literature.

“Key Personnel” are full-time management and technical staff who have a significant (key) role in the firm and will materially participate in providing services under the proposed services agreement.

Form S – Summary Qualifications of Principals, Key Personnel and Service Providers

Name of Key Person _____

Key Person's Title _____

Firm Name _____

Position for this Project: Service Provider Supervisor Manager/Administration

Professional or Medical Degrees:

Degree: _____ School: _____

Degree: _____ School: _____

Degree: _____ School: _____

Professional Certification: *Indicate here and provide details below for all that apply:*

- Licensed Physician
- Certified Industrial Hygienist
- Licensed Health Care Professional
- Board Certified Occupational Health Physician
- Board Certified Occupational Health Physician with NIOSH certification for Interpretation of PFT
- Person who may administer pulmonary function testing due to completion of a training course in spirometry sponsored by an appropriate academic or professional institution.

Specify academic or professional institution: _____

- B-Reader (Chest Roentgenograms)
- An experienced Licensed Physician with known expertise in pneumoconiosis

Experience

Total Years Providing Medical Services and/or Occupational Medical Services _____

Years with this Firm _____

Brief Resume:

Employer	Position	Dates

Active Registrations / Licenses / Certifications:

Accreditation, License, Certification or Registration, etc. (description)	Issuing State, Agency, or Organization	Expiration Date

Add additional pages as/if necessary

FEE PROPOSAL AND CERTIFICATION (FORM Y)

Instructions: Complete this Form to prepare the Fee Proposal and include documents as indicated. Certification sections must be duly signed and notarized as shown.

Firm Name: _____

Address: _____

Contact Name: _____

Contact E-mail: _____

Telephone: _____ **Fax:** _____

- Attach:** Fee Schedule (Exhibit B)
 Minority/Woman Owned Business Enterprise (M/W/BE) Participation Plan Form
 Equal Opportunity/Non-Discrimination in Hiring/Contracting Notice
 Certificate of Subsistence (Good Standing)

CERTIFICATION

This section must be used to certify the Fee Proposal. This Certification must be signed by a Principal listed on Form X who is authorized to make this certification and would have direct responsibility for this services contract.

I, _____, being duly sworn, state that
(Full Name)

I am _____ of _____,
(Title with Firm) (Full Legal Name of Firm)

and that I have read and understand the Environmental and Safety Medical Service Request for Proposal issued by the School District of Philadelphia in April 2018, for which the attached Fee Schedule is proposed. With my signature below:

- I commit the resources of the firm to provide the services proposed in the Technical Proposal and Fee Proposal for the medical service unit prices submitted in this Fee Proposal.
- I agree and warrant that I am duly authorized by the entity named above to make these commitments.
- I agree and warrant that providing this Fee Proposal is an event entirely under my control.

ATTESTED: Sworn and subscribed before me
on the _____ day of _____ **Original Signature:** _____ **Date:** _____

PRINT OR TYPE Name: _____

Notary Public

Original Signature: _____ **Title:** _____

**Contractor's Technical Proposal to Provide Professional Environmental
and Safety Program Training Services**

Section entitled "Contractor's Description of Scope of Services"

EXHIBIT "B"

FEE PROPOSAL AND CERTIFICATION (FORM Y)

Instructions: Complete this Form to prepare the Fee Proposal and include documents as indicated. Certification sections must be duly signed and notarized as shown.

Firm Name: _____

Address: _____

Contact Name: _____

Contact E-mail: _____

Telephone: _____ **Fax:** _____

- Attach:** Fee Schedule (Exhibit B)
 Minority/Woman Owned Business Enterprise (M/W/BE) Participation Plan Form
 Equal Opportunity/Non-Discrimination in Hiring/Contracting Notice
 Certificate of Subsistence (Good Standing)

CERTIFICATION

This section must be used to certify the Fee Proposal. This Certification must be signed by a Principal listed on Form X who is authorized to make this certification and would have direct responsibility for this services contract.

I, _____, being duly sworn, state that
(Full Name)

I am _____ of _____,
(Title with Firm) (Full Legal Name of Firm)

and that I have read and understand the Environmental and Safety Medical Service Request for Proposal issued by the School District of Philadelphia in April 2018, for which the attached Fee Schedule is proposed. With my signature below:

- I commit the resources of the firm to provide the services proposed in the Technical Proposal and Fee Proposal for the medical service unit prices submitted in this Fee Proposal.
- I agree and warrant that I am duly authorized by the entity named above to make these commitments.
- I agree and warrant that providing this Fee Proposal is an event entirely under my control.

ATTESTED: Sworn and subscribed before me
on the _____ day of _____ **Original Signature:** _____ **Date:** _____

PRINT OR TYPE Name: _____

Notary Public

Original Signature: _____ **Title:** _____

ATTACHEMENT “H” (RFP Exhibit “B”) – Fee Schedule

Proposal must include a fee per each unit price listed below

A proposed fee must be provided at each \$ sign to be deemed a complete fee proposal

ID	Medical Service	Provider Location	Estimated* Deliverables or Patients/Year	District Location**
AME-I	Asbestos Examination – Initial	\$	10	\$
AME-P	Asbestos Examination – Periodic	\$	120	\$
CXR	Chest X-Rays	\$	90	\$
RMC	Respirator Medical Clearance Initial Clearance	\$	100	\$
RFT	Respirator Fit Test	\$	130	\$
CE-1	Combined Examination 1 AME-I + CXR + RMC + RFT	\$		\$
CE-2	Combined Examination 2 AME-P + CXR + RMC + RFT	\$		\$
CE-3	Combined Examination 1 AME-P + RMC + RFT	\$		\$
OS-M1	Mobilization Charge per District Location Transportation and Set-up Charge	N/A	1	\$
OD-DC	Daily Charge for Equipment and Personnel <i>Per Diem Charge to Provide Medical Services at a District Location Inclusive of all Equipment, Medical Personnel, Supplies, and Expenses</i>	N/A	2	\$
QSR	Quarterly Summary Report (one report for all services)	\$	4	N/A
RFTID	Respirator Fit Test ID Card	\$	130	N/A

* The estimated number of medical service patients are provided here for proposal information only. These estimates are not binding in any way and shall not represent or imply minimum total annual fee.

This fee table is a tool to submit cost proposal and for the District to evaluate a proposal, it is not a binding agreement. It shall not be interpreted as a commitment to purchase, or contract to procure any implied total amount of medical services.

** Please submit proposed fees for providing these medical services On-Site at a location designated by the District. The District may choose to conduct medical services at the same location and time as a group receives required annual training. Medical Provider shall provide staff and equipment and mobile facilities capable of servicing up to 40 people per day.

EXHIBIT "C"

Exhibit "C"

**School District
Standard Terms and Conditions**

1. General Conditions of the Work.

a. *Standard of Performance.* In carrying out the Work, the Contractor shall exercise the highest degree of competence and diligence exercised by providers in the Contractor's field. The Contractor shall cooperate with the School District and all other Persons contracting with the School District whose work affects the Contractor's Work, or whose work the Contractor's Work affects. The Contractor shall perform all Work under this Contract to the satisfaction of the School District.

b. *Compliance with Applicable Law.* The Contractor shall comply with all Applicable Law in connection with this Contract.

c. *Warranty.* To the extent that the Work includes the sale or the furnishing of Materials, the Contractor warrants that the Materials shall be good, free of defects, merchantable and fit for the particular purposes for which the School District intends to use them.

d. *Contractor Responsibility for Quality of the Work.* Payment by the School District or acceptance of the Work, including any Materials, shall not relieve the Contractor of responsibility for the substance and quality of all Materials and Work. Without any additional compensation, the Contractor shall diligently and expeditiously correct any errors, deficiencies or omissions in the Work, including any Materials, and shall remain liable in accordance with this Contract and Applicable Law for all damages to the School District caused by the Contractor or the Work, including any Materials.

e. *Contractor Staff.* The Contractor shall not assign any Person dismissed from School District employment to perform any Work under this Contract. The Contractor shall within seven (7) days reassign from any Work any employee if the Responsible Official notifies the Contractor that, in the reasonable opinion of the Responsible Official, the employee is incompetent or incapable of carrying out any part of the Work assigned to that Person.

f. *Meetings.* Upon seventy-two (72) hours prior notice from the School District, the Contractor shall attend any meetings requested by the School District, at a location to be determined by the School District.

g. *Site License(s).* To the extent that the Contractor's Statement of Work, Exhibit "A" to this Contract, requires the Contractor to carry out any portion of the Work on premises of the School District, the School District, subject to the terms, covenants and conditions set forth in this Contract, hereby grants the Contractor a limited, revocable license to use such School District premises, and only such School District premises, as are expressly provided or by necessary implication required in order for the Contractor to complete the Work in conformity with the requirements of this Contract. The School District shall have the right at any time and for any reason to terminate the foregoing license. The Contractor covenants and agrees to comply with all rules and regulations concerning the use of School District premises imposed by the School District, including but not limited to rules and regulations set by a principal concerning his or her school. The Contractor shall promptly repair any and all damage to School District premises caused by the Contractor or any of the Contractor's officers, agents, employees or Subcontractors.

h. *Contract Reporting.* The Contractor shall comply promptly with the School District's reporting requirements for contracts, including electronic or other reporting of Contractor and contract data.

2. *Background Checks.* In accordance with 24 P.S. § 1-111, as amended, and 23 Pa. C.S.A. §§ 6354-6358, as amended, before starting any Work, the Contractor shall submit to the School District the originals of a current (*i.e.*, processed by the Commonwealth of Pennsylvania within one (1) year prior to the Contractor's starting Work) criminal history record information report and child abuse history official clearance statement for the Contractor, if the Contractor is an individual, and for each of the Contractor's and any of its Subcontractor's employees, officers, agents, servants, volunteers or Subcontractors who will have direct contact with children while performing any of the Work. Before starting any Work, the Contractor shall submit to the School District the original of a current report of the Federal Bureau of Investigation federal criminal history record information for the Contractor, if the Contractor is an individual, and for each of the Contractor's and any of its Subcontractor's employees, officers, agents, servants, volunteers or Subcontractors who will have direct contact with children while performing any of the

Work. Commonwealth Board of Education regulations define "direct contact"; see 22 Pa. Code § 8.1.

a. *Arrests; Convictions.* The Contractor shall comply and shall ensure that its officers, employees, agents and Subcontractors who carry out any of the Work comply with the requirements of 24 P.S. § 1-111(j), which mandates, among other things, reporting within seventy-two (72) hours by any officer, employee or agent of the Contractor or of any Subcontractor of an arrest or conviction for an offense listed in 24 P.S. § 1-111(e). The Contractor shall report to the School District, in a prompt and timely manner, all notices and reports required, and all checks conducted, under § 1-111(j).

3. *Compensation; Invoices.*

a. *Invoices Exclusive of Taxes.* Invoices shall be exclusive of state or local sales, use or gross receipts taxes, and federal excise taxes. The School District's Pennsylvania Sales Tax Blanket Exemption Number is 76-51500-1; its Federal Tax ID Number is 23-6004102; and its Federal Excise Tax Number is 23-63-0021-K.

b. *Support for Invoices.* If the Contractor, after a request by the School District, does not provide evidence satisfactory to the School District to support any item or items set forth on an invoice, the School District shall have no liability to make any payment with respect to that item or items. If the School District has already made payment for that item or items, the School District may by notice to the Contractor require the Contractor to refund to the School District the amount of any such overpayment, or the School District, at its option, may set off such overpayment against any payments accruing thereafter to the Contractor under this Contract or any other contract between the Parties.

4. *The Contractor's Duties Concerning Taxes and Other Obligations.* The School Reform Commission (the "Commission") by its Resolution SRC-2, dated February 21, 2013, adopted its Tax Compliance of Vendors Policy (the "Tax Policy") for School District vendors, including the Contractor. The Tax Policy provides that in general the Commission will not permit the School District to contract with Persons delinquent in payments of any City taxes or other indebtedness, at the execution and delivery of the Contract and at any time during the Term of the Contract.

a. *Contractor's Covenants.* In compliance with the requirements of the Tax Policy, the Contractor covenants and agrees that throughout the Term of this Contract, for itself and any Person controlling, controlled by or under common control with the Contractor, the Contractor shall comply with the following requirements.

i. At any time during the Term of this Contract upon notice from the School District the Contractor shall deliver to the School District proof of its tax compliance in the form of a "Certificate of Tax Clearance" from the City's Department of Revenue.

ii. At any time during the Term of this Contract upon notice from the School District the Contractor shall deliver to the School District proof in writing of its execution and delivery of a settlement agreement, payment plan or other necessary and appropriate documentation in satisfaction of any indebtedness to (A) the City for or on account of any City tax, including any tax collected by the City on behalf of the School District, or in satisfaction of any other indebtedness or obligation owed by the Contractor to the City; and (B) the Commonwealth of Pennsylvania for or on account of any Commonwealth tax, or in satisfaction of any other indebtedness or obligation owed by the Contractor to the Commonwealth.

iii. The Contractor shall promptly pay and otherwise promptly and diligently comply with and carry out its duties and obligations under any such settlement agreement, payment plan or other documentation with the City or the Commonwealth of Pennsylvania, until it has discharged its obligation to the City or the Commonwealth of Pennsylvania by satisfying any such tax or other indebtedness or obligation.

iv. The Contractor may in good faith, diligently and expeditiously, pursue any bona fide claim, contest or appeal with the Commonwealth, or the City, as the case may be, of its liability for, or the amount of, any indebtedness or obligation to the Commonwealth of Pennsylvania, or the City for or on account of any tax, including but not limited to any tax collected by the City on behalf of the School District, or other indebtedness or obligation, to the final appeal, adjudication, resolution or compromise thereof with the Commonwealth of Pennsylvania or the City. The Contractor shall promptly pay all uncontested taxes and other indebtedness or obligations to the Commonwealth of Pennsylvania and the City.

b. *The Contractor's Taxes, etc. - School District Set-Off.* The Contractor agrees that the School District shall have the right to set off against, or to withhold payment of, or both, any and all Compensation accruing and payable to the Contractor under this Contract and any other contract, in order to provide for and assure the payment by or on behalf of the Contractor of any and

all sums of taxes or other indebtedness or obligations then lawfully due and owing by the Contractor or any Person controlling, controlled by or under common control with the Contractor, to either the City or the Commonwealth. Each Party shall have the right to rely on certificates and other official documents provided by either the City or the Commonwealth in proceeding to withhold or set off under this subsection 4.b.

5. **Best Pricing.** The Contractor shall perform the Work at the lowest price the Contractor charges to other school districts or other governmental entities for like work. If the School District pays a price for the Work in excess of the lowest price the Contractor charges or has recently charged to a governmental entity, in addition to all other remedies, the School District shall have a right, as damages, to a refund equal to the difference between the price charged to the School District and the lowest price the Contractor charges or has recently charged to another governmental entity, together with interest at a rate equal to the prime rate of interest as published from time to time by the *Wall Street Journal*, plus five percent (5.0%).

6. **Unavailability of Funds; Crossing Fiscal Years.**

a. **Unavailability of Funds.** In the event the School District, in its sole determination, does not or cannot obtain or continue the funding for this Contract from any source or sources at an aggregate level sufficient to allow for payment for the Work, the School District may exercise one of the following alternatives: (1) terminate this Contract effective upon a date specified in a Termination Notice; or (2) continue this Contract by reducing, through written notice to the Contractor, the amount of this Contract and the scope of the Work, consistent with the nature, amount and circumstances of the loss of funding. Any termination or reduction of this Contract pursuant to this subsection shall not affect any obligations or liabilities of either Party accruing prior to such termination or reduction. The School District shall not face any liability or penalty as a result of such termination or reduction of this Contract.

b. **Crossing Fiscal Years.** If the School District will pay any portion of the Compensation in any School District fiscal year subsequent to the current fiscal year (the School District's fiscal year runs July 1 – June 30), the portion of the Compensation that may accrue hereunder in a subsequent fiscal year remains subject to legally mandated budget authorization by the School Reform Commission, or the Board of Education, as the case may be, of the School District, under Applicable Law. If for any reason funds for that portion of the Compensation that may accrue hereunder in a subsequent fiscal year are not continued in any subsequent School District fiscal year, this Contract and the School District's liability under this Contract shall automatically terminate at the end of the fiscal year for which the School Reform Commission or the Board of Education, as the case may be, authorized funds.

7. **Grant-Funded Contracts; Trust-Funded Contracts.**

a. **Compliance with Grant.** If the School District pays for all or any portion of the Work with funds received by the School District as grants or under other terms and conditions from any source, including the United States of America, the Commonwealth of Pennsylvania, The City of Philadelphia (the "City"), or any department or agency of said governments, or from any public or private charitable trust fund, then the Contractor shall comply with the terms of the applicable grant agreement, contract or trust indenture, as the case may be, in carrying out the Work, and the School District shall comply with the terms of said grant agreement, contract or trust indenture, as the case may be, in making any payment or payments hereunder to the Contractor. The Contractor shall not take any action, or omit to act, if such act or omission would cause a breach or default under any such grant agreement, contract or trust indenture.

b. **Timely Submission of Invoices.** If the School District pays any of the Compensation from federal government or Commonwealth of Pennsylvania grant funds, the Contractor shall bill the School District for any outstanding compensation owed to the Contractor within thirty (30) days after the end of the Term (see Section 3 of the Agreement for Services). In the event the Contractor does not bill the School District for the balance of any compensation within said thirty (30) day period, the School District reserves the right to withhold payment of the balance of the Compensation to the Contractor based upon the unavailability of federal government or Commonwealth of Pennsylvania funds, in which event the School District shall have no liability to the Contractor for said balance of the Compensation.

8. **Independent Contractor.** The School District has engaged the Contractor as an independent contractor to carry out the Work, and neither the Contractor nor any of the Contractor's agents, employees or Subcontractors shall in any way or for any purpose whatsoever be deemed an agent or employee of the School District. Neither the Contractor nor any of its agents, employees or Subcontractors constitute employees of the School District, and these Persons shall have no right to receive any School District employee benefits, or any other privileges available to School District employees. Neither the Contractor nor its agents, employees or Subcontractors shall represent themselves in any way as agents or employees of the School District, and none

of the Contractor, its agents, employees or Subcontractors has any power to bind legally the School District to any third party.

9. **Non-Discrimination.** The Contractor, for itself, its officers, agents, employees and Subcontractors, covenants and agrees that it shall not discriminate against or intimidate any employee or other Person on account of age, race, color, sex, sexual orientation, handicap, disability, religious creed, ancestry, national origin or Vietnam-era or any other veteran status. The School District is an equal opportunity employer under Applicable Law, and requires the same of the Contractor. The School District shall not do business with any Person that unlawfully discriminates on the basis of age, race, color, sex, sexual orientation, handicap, disability, religious creed, ancestry, national origin or Vietnam-era or any other veteran status, or any other impermissible ground in hiring, promotion, subcontracting or procurement practices. The Contractor shall include the first three sentences of this Section 9, with appropriate adjustments for the identity of the parties, in any Subcontracts that it executes and delivers. If the School District has selected the Contractor pursuant to a public solicitation or through a request for proposals ("RFP") or comparable process and the Contractor submitted a plan describing the participation of minority-, women-owned or disadvantaged businesses as part of the solicitation or the RFP, then the Contractor shall comply with its participation plan.

10. **Subcontracts.**

a. **School District Consent Required.** The Contractor shall not delegate or enter into any Subcontract for the performance of any of its obligations under this Contract, including any portion of the Work, in whole or in part, without in each instance first giving notice to and obtaining the written consent of the School District, which consent the School District may grant, withhold, condition or delay in its sole discretion. The School District hereby consents to any Subcontract entered into by the Contractor specifically referenced in Exhibit "A", the Contractor's Statement of Work, to this Contract. Any subcontract made in violation of this Section shall be null and void. The School District shall have no obligation to any Subcontractor. Each Subcontract shall contain clauses to the effect that (i) the Subcontractor shall have no recourse to the School District for any payment, or for performance under, such Subcontract; (ii) the Subcontractor consents to any assignment of the Subcontract by the Contractor to the School District, at the School District's sole option; and (iii) the Contractor shall make payment to any Subcontractor within five (5) business days after receipt of payment from the School District with respect to work properly invoiced by a Subcontractor to the Contractor and reflected in the payment by the School District to the Contractor.

b. **No Change in the Contractor's Obligations.** The existence of any Subcontract shall not alter or limit the obligations of the Contractor to the School District under this Contract. The Contractor shall at all times remain fully responsible for its Subcontractors, and shall ensure that it legally binds all Subcontractors to the same terms and conditions as the Contractor under this Contract, including without limitation, non-discrimination, warranties, confidentiality, maintenance and preservation of records and audit by government representatives.

11. **Non-Assignment.** The Contractor acknowledges that the Work constitutes personal or professional services, or both, of the Contractor. Except through a Subcontract subject to Section 10 above, the Contractor shall not assign this Contract, or any part of this Contract, nor delegate performance of any part of this Contract, without the prior written consent of the School District, which consent the School District may grant, withhold, condition or delay in its sole discretion. This Contract legally binds the Parties and their respective successors and assigns. Any purported assignment in violation of this provision shall be void and of no effect. The School District's consent to an assignment shall not release the assignor from any liability accrued or thereafter accruing under this Contract. Any assignment shall be in writing and shall contain an express assumption by the assignee of all liability accrued or thereafter accruing under this Contract. Consent by the School District to any assignment shall not constitute a course of conduct, dealing or performance with respect to any other assignment or proposed assignment. For purposes of this Section 11, an assignment includes the acquisition of the Contractor, or a controlling interest therein, through an asset sale or a corporate or other merger, the appointment of a receiver or bankruptcy trustee for the Contractor, and the transfer of this Contract or the Contractor in any bankruptcy or other insolvency-related proceeding. A receiver or trustee of or for the Contractor in any federal or state bankruptcy, insolvency or other proceeding concerning the Contractor shall comply with the requirements set forth in this Contract, including but not limited to this Section.

12. **Audits; Records and Payments.**

a. **Audits.** From time to time during the Term of this Contract, and for a period of six (6) years after the expiration or termination of this Contract (see 24 P.S. § 5-518), the School District, the Controller of the City, the Commonwealth of Pennsylvania, including without limitation its Auditor General and the Pennsylvania Department of Education, or a department, agency or instrumentality of the United States of America, if the School District funds this Contract with federal funds, or any of their authorized representatives (each, for the purposes of this Section, an "Auditor") may audit any and all aspects of the Contractor's performance under this Contract, including but not limited to its billings and invoices and payments received. If

requested by an Auditor or the School District, the Contractor shall submit to the Auditor and the School District for review or inspection, all invoices presented for payment pursuant to this Contract, all cancelled checks, Materials, invoices, vouchers, reports, work product, work papers, books, records and accounts upon which the invoices are based, and any and all documentation and justification in support of expenditures or fees incurred pursuant to this Contract.

b. *Inspection.* The Contractor acknowledges and agrees that any Auditor may inspect or review all of its Work and Materials, and all of its sites, locations and facilities related to its performance under this Contract. Inspection and review of Work and Materials shall take place at the offices of the Contractor in the City, or in another location with the Auditor's consent. The Contractor shall cooperate with all School District, City, Commonwealth of Pennsylvania and federal inspections and reviews conducted in accordance with the provisions of this Contract. The scope of such inspection and review of the Work and Materials, and sites, locations and facilities, including, without limitation, programs, lies in the sole discretion of the Auditor. Such inspection or review may include, without limitation, meetings with persons receiving services under this Contract, review of staffing ratios and job descriptions, and meetings with any of the Contractor's staff members who either directly or indirectly participate or participated in carrying out any of the Work, including preparing, delivering or installing any Materials.

c. *Availability of Records.* The Contractor shall make available, in the City at reasonable times during the Term of this Contract and for the period set forth in subsection 12.d. below, all records pertaining to this Contract for the purpose of inspection, audit or reproduction by any Auditor. The Contractor shall provide such records without unreasonable delay when requested by an Auditor.

d. *Retention of Records.* The Contractor shall retain all records, books of account and documentation pertaining to this Contract for the greater of the period required by Applicable Law or six (6) years following expiration or termination of this Contract; if, however, any litigation, claim or audit commences prior to expiration of said six (6) year period, then the Contractor shall retain the records until all litigation, claims or audit findings have been completely terminated or resolved without right of further appeal.

13. *Indemnification; Litigation Cooperation; Notice of Claims.*

a. *Indemnification.* The Contractor shall indemnify, defend and hold harmless the School District, its officers, employees, agents and the members of the School Reform Commission and the Board of Education, from and against any and all losses, expenses, including, but not limited to, litigation and settlement costs and attorneys' fees and costs, claims, suits, actions, damages, and liability for or on account of actual or alleged loss of life, bodily injury, personal injury, damage to property, or the use of facilities or equipment furnished to the Contractor, that arise out of or are related to the performance or non-performance of the Work by the Contractor or the Contractor's agents, Subcontractors, assignees, independent contractors, employees or servants. The Contractor shall indemnify, defend and hold harmless the School District, its officers, employees, agents and the members of the School Reform Commission and the Board of Education, from and against any and all losses, expenses, including, but not limited to, litigation and settlement costs and attorneys' fees and costs, claims, suits, actions, damages and liability for or on account of actual or alleged violation of any third party's copyright, trademark, patent, trade secret or other valid proprietary right, employment discrimination, contamination of or adverse effects on the environment, intentional acts or omissions, failure to pay any Subcontractors or suppliers, any Event of Default under this Contract, and breach, if any, of any Subcontract, that arise out of or are related to the performance or non-performance of the Work by the Contractor or the Contractor's agents, Subcontractors, assignees, independent contractors, employees or servants.

b. *Indemnification; Contractor's Employees.* This Section 13 protects the School District, its officers, employees, agents and the members of the School Reform Commission and the Board of Education from all claims arising during the Term of this Contract asserted by employees, agents or workers of the Contractor or any Subcontractor who are injured on or by School District real or personal property, or who assert an employment claim of any kind, including but not limited to any claim or claims relating to the termination of employment, regardless of when the claimant makes the claim. Except as expressly set forth below in this subsection 13.b., the Parties shall not construe this Section 13 to alter, limit, negate, abridge or otherwise reduce any other right or obligation that would otherwise exist as to any Party or Person described in this Contract. This Section 13 functions independently of the Contractor's or its Subcontractors insurance or lack thereof, and the Parties do not intend that rights set forth in this Section 13 be deemed limited by the Pennsylvania's Worker's Compensation Act. This Section 13 shall apply, particularly, but not exclusively, to the claims of the Contractor and all of its Subcontractors, and all of their respective officers, agents, representatives and employees, against the School District, its officers, employees and agents, and the members of the School Reform Commission and the Board of Education. The Contractor and all of its Subcontractors, and all of their respective officers, agents, representatives and employees, shall have no claim against the School District, its officers, employees and agents and the members of the School Reform Commission and the Board of Education for the acts, failures to act or negligence of the School

District, or its officers, employees and members of the School Reform Commission or Board of Education.

c. *Litigation Cooperation.* If at any time, including after the expiration or earlier termination of the Term of this Contract, the School District becomes involved in a dispute or receives notice of a claim, or is involved in litigation concerning the Work and Materials provided under this Contract, the resolution of which requires the services or cooperation of the Contractor, and the Contractor does not otherwise have a duty to indemnify and defend the School District pursuant to the provisions of subsection 13.a. above, the Contractor shall provide such services and shall cooperate with the School District in resolving such claim or litigation as part of the Work and Materials under this Contract.

d. *Notice of Claims.* If the Contractor receives notice of a legal claim against it in connection with or in any way related to this Contract, the Contractor shall (1) submit appropriate written notice of such claim to its insurance carrier within the time frame required for submission of claims by the applicable insurance policy and, (2) within five (5) business days of receipt of notice of the claim, give notice of such claim to the School District.

14. *School District Statutory Immunity.* Any other term, covenant or condition of this Contract to the contrary notwithstanding, the School District, its officers, employees and agents and the members of the School Reform Commission and the Board of Education, retain their statutory governmental, official and any other immunity provided pursuant to the Applicable Law, including 42 Pa. C.S.A. §§ 8501 and 8541 *et seq.*, and do not waive the defenses of governmental and official immunity derived from such laws. The School District does not waive for itself or for its officers, employees, or agents, or for the members of the School Reform Commission and Board of Education, any other defenses or immunities available to it or any of them.

15. *Insurance.* The Contractor shall, at its own expense, procure and maintain the types and minimum limits of insurance specified below covering the Contractor and the performance of the Work. The Contractor shall procure all insurance solely from insurers authorized to do business on an admitted basis in the Commonwealth of Pennsylvania, or otherwise acceptable to the School District's Office of Risk Management. The Contractor shall procure all insurance through an insurance carrier or carriers, each of which shall have at least an A- (Excellent)/FSC-XI rating from A.M. Best. All insurance herein, except the professional liability insurance, shall be written on an "occurrence" basis and not a "claims-made" basis. In no event shall the Contractor commence performing any part of the Work until the Contractor has delivered to the School District the required proof of insurance. The insurer shall provide for at least thirty (30) days prior written notice to the School District in the event the Contractor and its insurer or insurers materially change, cancel or non-renews any insurance policy. The Contractor shall name The School District of Philadelphia and its officers, employees and agents as additional insureds on the general liability insurance policy, and the Contractor shall ensure that its insurer so endorses this policy. The Contractor shall procure and maintain an endorsement or endorsements stating that (i) the coverage afforded the School District and its officers, employees and agents as additional insureds shall be primary to any other coverage available to them, and (ii) no act or omission of the School District or its officers, employees and agents shall invalidate the coverage, other than an act or omission that constitutes willful misconduct or gross negligence.

a. *Workers' Compensation and Employer's Liability.* Workers' Compensation limits shall be the statutory limits, and employers' liability insurance, with limits of (1) \$100,000 Each Accident-Bodily Injury by Accident; (2) \$100,000 Each Employee-Bodily Injury by Disease; and (3) \$500,000 Policy Limit-Bodily Injury by Disease. Any other states' insurance under this subsection shall include Pennsylvania.

b. *General Liability Insurance.* Limit of Liability: \$1,000,000 per occurrence combined single limit for bodily injury, including death, and property damage liability; \$1,000,000 advertising injury; \$2,000,000 general aggregate, and \$2,000,000 aggregate for products and completed operations. The general liability insurance shall cover: premises operations; blanket contractual liability, personal injury liability; products and completed operations; independent contractors, employees and volunteers as additional insureds; cross-liability; and broad form property damage including completed operations. The School District may require higher liability limits or aggregate coverages at any time during the Term if in the School District's sole discretion, the risk warrants.

c. *Automobile Liability Insurance.* Limit of Liability: \$1,000,000 per occurrence combined single limit for bodily injury, including death, and property damage liability, arising from owned, non-owned, and hired vehicles when any motor vehicle is used in connection with the Work.

d. *Professional Liability Insurance.* Limit of Liability: \$1,000,000 with a deductible not to exceed \$100,000. The professional liability insurance shall cover errors and omissions, including liability assumed under this Contract. The Contractor may permit its insurer to write this coverage on a claims-made basis, provided that the Contractor shall maintain coverage for

occurrences arising out of the performance of the Work required under the Contract in full force and effect under the policy or "tail" coverage for a period of at least three (3) years after completion of the Work, or shall provide for an extended reporting period of at least three (3) years after cancellation of the policy.

i. *Educator's Legal Liability Insurance.* If the Contractor, including its officers, employees or agents, will or may have direct contact with children, the Contractor shall procure and maintain educator's legal liability coverage of \$1,000,000 per occurrence combined single limit / \$2,000,000 general aggregate coverage. Educator's Legal Liability Insurance coverage must include coverage for wrongful physical or sexual contact. If the Contractor provides educational services, the Educator's Legal Liability coverage shall also include educational wrongful acts, employment practices wrongful acts and directors and executive officers wrongful acts.

Certificates of Insurance evidencing the required coverages and endorsements providing proof of insurance must specifically reference the School District contract number set forth on the first page of the Agreement for Services (please type this contract number in the 'Description' section of the certificate). The Contractor shall deliver the original certificate and endorsements providing proof of insurance to:

The School District of Philadelphia
Office of Risk Management
440 North Broad Street, Third Floor
Philadelphia, PA 19130-4015
(215) 400-4590

The Contractor shall deliver the certificate of insurance and endorsements providing proof of insurance to the School District at least ten (10) days before any Work or any extension of the Term begins. Under no circumstances shall the Contractor actually begin Work, or continue Work, in the case of an extension of the Term, without providing the evidence of insurance. The Contractor shall not self-insure any of the coverages required under this Contract without the prior written consent of the School District's Office of Risk Management. The School District reserves the right to require the Contractor to provide certified copies of the original policies of all insurance required under this Contract at any time upon ten (10) days written notice to the Contractor.

16. Confidentiality; Student Records; Data Ownership.

a. *Confidential Information.* The Contractor shall keep in strict confidence all information acquired in connection with or as a result of this Contract that is not generally known to others ("Confidential Information"). During the Term of this Contract and at any time thereafter, without the prior written consent of the School District, the Contractor shall not disclose or use to its advantage, profit or gain any Confidential Information or any other information subject to a third party's proprietary right, such as a copyrighted or trademarked work.

b. *Student Records.* The Contractor shall keep in strict confidence as required and to the fullest extent required by any Applicable Law, including but not limited to the Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g ("FERPA"), any and all records and information, in whatever form or format received, pertaining to the School District's individual students and children, including but not limited to any academic or grade information, attendance, truancy, discipline, receipt of special education services or supplementary educational services, social security or public benefits, or information as to race, ethnicity or disability. The Contractor acknowledges and agrees that FERPA limits the transfer and re-transfer of education records and personally identifiable information in education records. The School District shall transmit information or records, or both, protected by FERPA solely to the individual named in Section 7 of the Agreement for Services, and such other duly authorized individuals as the Contractor may specify by notice to the School District (*see* Section 7 of the Agreement for Services and Section 21 of these Standard Terms and Conditions).

c. *Publication Rights.* With regard to any reports, studies or other works developed in the course of this Contract, or as a result thereof, the Contractor shall not publish Confidential Information or any other information which identifies students, employees or officers of the School District by name without first obtaining written consent from such individuals, or in the case of a student, his or her parent or legal guardian. The Contractor shall provide to the School District for its review any proposed publication, brochure or advertisement that names the School District not less than thirty (30) calendar days prior to submission for publication, and the Contractor shall remove the School District's name and any information identifying the School District from the publication if the School District requests removal. The Contractor shall not issue, publish or divulge any Materials developed or used in the performance of this Contract or make any statement to the media relating to the Contract without the prior consent of the School District.

d. *Data Ownership.* The School District retains and reserves its ownership of, and all right, title and interest in, any and all data provided by the School District to the Contractor under or in connection with this Contract. The Contractor acknowledges and agrees that the School District grants to the Contractor a limited, revocable, nonexclusive right and license to use any such School District data, which may include personally identifiable information subject to FERPA, solely for the Contractor's use in carrying out the Work set forth in this Contract and solely in conformity with FERPA and other Applicable Law. At any time during and after the expiration or earlier termination of the Term of this Contract, the School District may request that the Contractor deliver to the School District all or any portion of any data provided by the School District; promptly upon receipt of any such request the Contractor shall, without any charge to the School District, deliver to the School District the requested data in a usable format reasonably specified by the School District. School District data includes any information and data developed by the Contractor, e.g., by populating a database, as part of or associated with the Work set forth in this Contract. The Contractor shall not destroy nor permit the destruction of any School District data, except upon the prior express written consent of the School District. Upon the expiration or earlier termination of the Term of this Contract, the Contractor shall promptly and in any event not later than ten (10) business days after request by the School District, return to the School District all School District data then in the possession or control of the Contractor. Once the Contractor has returned all School District data, it shall promptly destroy and dispose of any remaining copies of the data in its possession or in the possession of any Subcontractor.

17. *Materials; Intellectual Property.*

a. *Computer Programs.* The Contractor shall ensure that all of its computer programs, tapes and software developed under this Contract comply with any pertinent specifications or requirements set by the School District.

b. *License.* For the duration of the Term, as the Parties may agree to extend it, the Contractor hereby grants, and shall require its Subcontractors, if any, to grant, to the School District the irrevocable, royalty-free right to reproduce, distribute copies of, adapt, display, perform, translate, and publish, throughout the universe, in any medium now known or hereafter invented, all Materials and works of authorship, including without limitation studies, media, curricula, and other things of any nature, developed pursuant to this Contract.

18. *Conflict of Interest.*

a. *Disclosure of Conflict of Interest.* The Contractor represents, warrants and covenants that it has no public or private interest which does or may conflict in any manner with the performance of the Work and that neither it, nor any of its directors, officers, members, partners, employees or Subcontractors, has or shall during the Term acquire, directly or indirectly, any such interest. The Contractor shall promptly and fully disclose to the School District's Responsible Official all interests which constitute or may constitute such a conflict.

b. *Improper Gift; Improper Relationship.* The Contractor represents, warrants and covenants that it has not directly or indirectly offered or given and shall not directly or indirectly offer or give any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal or minimal value to any School District employee who participated in the decision to authorize or enter into this Contract. The Contractor warrants that, to its knowledge, neither a School District employee or officer who participated in the decision to enter into this Contract, nor any member of the employee's immediate family, receives more than \$1,000 per year from the Contractor, has a direct or indirect investment worth \$1,000 or more in the Contractor or is a director, officer, partner, trustee or employee of the Contractor.

c. *School District Employees Not to Benefit.* The Contractor shall not make any payment or give anything of more than nominal value to any School District official or employee except in accordance with Applicable Law and School District policy. The Contractor shall comply with the School District's vendor Code of Ethics, and also, to the extent applicable, with the School District's Code of Ethics for School District officers and employees. The Contractor shall disclose to the School District the name of each School District official or employee who receives payment from the Contractor, the amount such official or employee receives and the services rendered by the official or employee in consideration of the payment.

19. *Default; Notice and Cure; Remedies.*

a. *Event of Default.* Each of the following constitutes an Event of Default by the Contractor under this Contract:

i. Failure by the Contractor or any Subcontractor to comply with any term, covenant or condition set forth in this Contract.

ii. The Contractor's (a) filing for bankruptcy, (b) making any assignment for the benefit of creditors, (c) consent to the appointment of a trustee or receiver (d) insolvency, as defined by Applicable Law, or (e) the filing of an involuntary petition against the Contractor under the Federal Bankruptcy Code or any similar state or federal law which remains undismissed for a period of forty-five (45) days.

iii. Default by the Contractor under any other agreement the Contractor may have with the School District.

iv. Any material misrepresentation by the Contractor in (A) this Contract, (B) any other document submitted to the School District by the Contractor, or (C) otherwise by the Contractor directly or indirectly to the School District in connection with the School District's decision to execute, deliver and perform this Contract.

v. Failure of the Contractor to provide, within five (5) business days, assurance reasonably acceptable to the School District that it can perform the Work in conformity with the terms of the Contract if (1) the School District has a reasonable basis to believe at any time during the Term of the Contract that Contractor will not be able to perform the Work; and (2) the School District demands in writing assurance of the Contractor's performance.

vi. Misappropriation by the Contractor of any funds provided under this Contract or failure by the Contractor to notify the School District upon discovery of any misappropriation.

vii. Indictment of or other issuance of formal criminal charges against the Contractor, or any of its directors, employees, agents or Subcontractors or any of the directors, employees or agents of a Subcontractor or any criminal offense or any other violation of Applicable Law directly relating to this Contract, the Work or the Materials, or which adversely affects the Contractor's performance of this Contract in accordance with its terms, whether or not a court of law or other tribunal ultimately accepts a verdict or plea of guilty or no contest regarding the charged offense.

viii. Debarment or suspension of the Contractor or any director, agent, employee or Subcontractor of the Contractor, or any Person controlling, under common control with, or controlled by, the Contractor under a federal, state or local law, rule or regulation.

ix. Failure by the Contractor to comply with any term, covenant or condition set forth in Section 4, *Contractor's Duties Concerning Taxes, etc.*, above in these Standard Terms and Conditions, or the breach of any of the Contractor's representations and warranties set forth in subsection 22.f., below.

b. *Notice and Cure.* If the Contractor commits or permits an Event of Default, the School District shall notify the Contractor in writing of its determination that an Event of Default has occurred. The Contractor shall have ten (10) business days from receipt of that notice, or such additional cure period as the School District may authorize in its sole discretion, to correct the Event of Default; provided, however, that no such notice from the School District or period of cure shall be required before invoking the remedies described in subsection 19.c. if: (1) the Contractor has temporarily or permanently ceased performing the Work; (2) an emergency has occurred relating to the Work, and that emergency requires immediate exercise of the School District's rights or remedies, as determined by the School District in its sole discretion; (3) the School District has previously notified the Contractor more than once in the preceding twelve (12) month period of any Event of Default under this Contract; (4) an Event of Default occurs as described in subsection 19.a. vi., vii., or viii. above; or (5) the Contractor breaches any of its obligations under Sections 2 or 9 of these Standard Terms and Conditions. Nothing set forth in this subsection 19.b. shall limit the School District's rights under subsection 19.c.

c. *Remedies.* If the Contractor does not cure the Event of Default within the period allowed by the School District, or if the Contractor commits or permits an Event of Default for which subsection 19.b. above provides no notice or period of cure, then the School District may, without further notice or demand to the Contractor, and without waiving or releasing the Contractor from any of its obligations under this Contract, invoke and pursue any or all of the following remedies:

i. terminate this Contract by giving the Contractor a Termination Notice.

ii. perform, or cause a third party to perform, this Contract, in whole or in part. The Contractor shall be liable to the School District, as damages, for all expenses incurred by the School District or a third party pursuant to this subsection 19.c.ii., together with interest at the prime rate of interest as published from time to time by the *Wall Street Journal*, plus five percentage points (5.0%). The School District shall not in any event be liable for inconvenience, expense, loss of profits or other

damage incurred by the Contractor by reason of the School District's performance or paying such costs or expenses.

- iii. withhold payment of, or offset against, any funds payable to or for the benefit of the Contractor.
- iv. collect, foreclose or realize upon any bond, collateral, security or insurance provided by or on behalf of the Contractor.
- v. any other legal or equitable remedy available to the School District, including but not limited to a legal action for breach and damages against the Contractor.

d. *Specific Performance.* The Contractor's Work and Materials represent unique services and things, not otherwise readily available to the School District. Accordingly, the Contractor acknowledges that, in addition to all other remedies, the School District shall have the right to enforce the terms of this Contract by a decree of specific performance or an injunction, or both, restraining a violation, or attempted or threatened violation, of any term, covenant or condition set forth in of this Contract.

e. *Concurrent Pursuit of Remedies.* The School District may exercise any or all of the remedies set forth in this Section 19, each of which the School District may pursue separately or in conjunction with any other remedy or remedies, as the School District shall determine. The School District may in its sole discretion elect not to exercise any of the above remedies and may permit the Contractor to continue to perform the Work. No extension or indulgence granted by the School District to the Contractor shall operate as a waiver of any of the School District's rights in connection with this Contract.

20. *Termination for Convenience.* The School District may terminate this Contract for its convenience, that is, for any reason or for no reason at all, at any time, in its sole discretion, upon fourteen (14) days prior written notice to the Contractor of the School District's termination of this Contract (a "Termination Notice"), without penalty, cost or liability to the School District. If the School District terminates this Contract, the School District shall pay the Contractor for any Work satisfactorily completed before the effective date of termination, but in no event shall the Contractor have any right to receive costs caused by or related to loss of profits for Work that the Contractor did not perform because of the early termination, or for loss of profits for services the Contractor could have performed for other Persons absent its engagement under this Contract.

a. *Contractor Actions upon Termination.* Upon receipt of a Termination Notice from the School District under Sections 6., 19., or 20 above, the Contractor shall take immediate action to effect the orderly discontinuance of the Work. The Contractor shall collect, assemble and transmit to the School District, at the Contractor's sole expense, all Materials developed under this Contract. The Contractor shall clearly label and index to the satisfaction of the School District all such Materials, and shall deliver all such Materials to the School District within thirty calendar (30) days after receipt of a Termination Notice, or in such shorter period as the School District may specify in its Termination Notice.

21. *Notices.* Except as expressly provided to the contrary in any other Section of this Contract, the Parties shall give all notices, waivers, consents and approvals required under this Contract in writing. The Parties shall deem any notices, waivers, consents and approvals duly given (a) when received or refused if delivered by hand with receipt given or refused; (b) on the next business day if delivered by a nationally recognized overnight courier service (e.g., Federal Express, United Parcel Service); (c) on the date confirmed for receipt by facsimile if delivered by facsimile, provided that any notice by facsimile shall be promptly confirmed by one of the other methods set forth in this section; and (d) upon receipt or refusal of delivery if sent by certified or registered United States mail, return receipt requested. In each case the Parties shall send notices to the other Party's representative as set forth in and at the addresses set forth in Section 7 of the Agreement for Services. The Parties shall not transmit notices required under or in connection with this Contract by electronic mail.

22. *Representations and Warranties.* Effective as of the execution and delivery of this Contract and throughout the Term of this Contract, the Contractor makes the following representations, warranties and covenants to the School District.

a. It has all necessary power and authority to execute, deliver and perform this Contract and has completed all actions necessary in order to duly authorize the execution, delivery and performance of this Contract, including duly authorizing the Person who signs this Contract to do so on its behalf.

b. This Contract, when executed and delivered, shall constitute a legal, valid and binding obligation of the Contractor, enforceable against the Contractor in accordance with its terms.

c. The Contractor is financially solvent, can and shall pay all its debts as they mature, and possesses working

capital sufficient to carry out the Work.

d. The Contractor owns or has duly and validly licensed from a third party the Materials and any other materials used by the Contractor in carrying out the Work; the Contractor's use or delivery thereof to the School District in connection with this Contract, and any use thereof by the School District as contemplated by this Contract, does not and shall not violate any third party's copyright, patent, trade secret or other proprietary right.

e. The Contractor is and shall be, at all times during the Term of this Contract, duly qualified to transact business in the Commonwealth of Pennsylvania, professionally competent and duly licensed to carry out the Work, if the performance of the Work requires any license or licenses.

f. The Contractor and any other Person controlling, controlled by, or under common control with the Contractor are not currently indebted to the City or the Commonwealth of Pennsylvania for or on account of any delinquent taxes, including but not limited to any taxes imposed, levied, authorized or assessed by the Commonwealth or the City, including any tax imposed, levied, authorized or assessed for or on behalf of the School District, for which no written settlement agreement or payment plan with the City, or the Commonwealth of Pennsylvania, as the case may be, has been executed and delivered.

g. Neither the Contractor nor any of its principals or Subcontractors, nor any other Person controlling, controlled by, or under common control with, the Contractor, are under suspension or debarment, have received official notice of commencement of proceedings for debarment or have been declared ineligible for contracts, bids, RFPs or contract awards by the Commonwealth of Pennsylvania, the City, any Federal agency or any school district.

The Contractor shall provide immediate written notice to the Responsible Official if at any time during the Term of this Contract the Contractor learns that any of these representations, warranties or covenants was or has become erroneous.

23. Definitions. Except as expressly provided to the contrary elsewhere in these Standard Terms or Conditions or in the Agreement for Services, capitalized terms shall have the meanings specified in this Section. In the event of a conflict between a definition in these Standard Terms and Conditions and the Agreement for Services, the definition in the Agreement for Services shall apply. In the event of a conflict between a definition in any exhibit, addendum or attachment to the Agreement for Services and a definition in these Standard Terms and Conditions, the definition in these Standard Terms and Conditions shall apply.

a. *Agreement for Services.* "Agreement for Services" means the instrument headed "Agreement for Services", which forms a part of this Contract and which contains the signatures of the School District and the Contractor, and sets forth certain of the terms, covenants and conditions specific to the Contractor's engagement.

b. *Applicable Law.* "Applicable Law" means and includes all federal, state, and local statutes, ordinances, resolutions and regulations, including the rules and regulations of any government authority, School District rules, regulations and policies applicable to the School District, the Contractor and the Work, and includes all applicable case law, court orders, injunctions and consent decrees.

c. *City.* "City" has the definition set forth above in subsection 7.a.

d. *Contract.* "Contract" means the agreement of the Parties evidenced by the instruments integrated into and forming a part of this Contract, *i.e.*, the Agreement for Services, Exhibit "A", Exhibit "B", if any, these Standard Terms and Conditions and any other Exhibit incorporated into this Contract as set forth in the Agreement for Services.

e. *Event of Default.* "Event of Default" means those events defined and identified in subsection 19.a. of these Standard Terms and Conditions.

f. *FERPA.* "FERPA" has the definition set forth above in subsection 16.b.

g. *Materials.* "Materials" means any and all reports, records, documents, documentation, information, supplies, plans, original drawings, specifications, computations, sketches, renderings, arrangements, videos, pamphlets, advertisements, statistics and other data, computer tapes, computer software, and other tangible work product, materials or goods prepared, supplied or developed by the Contractor as part of or in connection with the Work, or for the Contractor by a Subcontractor in connection with the Work, and deliverable or delivered to the School District by the Contractor or its Subcontractor pursuant to this Contract.

h. *Party; Parties.* A "Party" means either the School District or the Contractor; the "Parties" means the School District and the Contractor.

i. *Person.* "Person" means any individual, association, partnership, limited partnership, joint venture, corporation, limited liability company or other form of entity or association recognized at law.

j. *Responsible Official.* "Responsible Official" means the School District official named in Section 7 of the Agreement for Services.

k. *Subcontract; Subcontractor.* "Subcontract" means a contract made between the Contractor and a Subcontractor providing for the completion of some part or parts of the Work or Materials by a Subcontractor. "Subcontractor" means a Person performing under a contract with the Contractor a part of the Work or Materials that the Contractor has agreed to carry out pursuant to this Contract.

l. *Termination Notice.* "Termination Notice" means a notice given by the School District of its intent to terminate the Contract and its termination of the Contract as referenced in Sections 6, 19 and 20. Such notice shall specify an effective date.

m. *Work.* "Work" means the work, including any Materials, that the Contractor has agreed to complete under this Contract, as described in Section 1 of the Agreement for Services, Exhibit "A" to this Contract, and any relevant exhibits or addenda forming part of this Contract.

Unless otherwise expressly defined in this Contract, words that have well-established technical meanings or definitions in the field of public primary and secondary education have the same well-established meanings or definitions when used in this Contract.

24. *Miscellaneous.*

a. *Applicable Law; Venue.* The Parties, and any court or other tribunal, shall construe and enforce this Contract under the laws of the Commonwealth of Pennsylvania, regardless of its conflict of laws provisions, and without the aid of any canon, custom or rule of law requiring construction against the draftsman. In the event that the Parties cannot amicably resolve any dispute and a Party resorts to legal action, that Party shall file suit only in the state or federal courts sitting in Philadelphia, Pennsylvania.

b. *Headings.* Section headings in this Contract serve for reference only and shall not in any way affect the meaning or interpretation of this Contract.

c. *Order of Precedence.* In the event of conflict or variation between the Standard Terms and Conditions or the Agreement for Services and any other exhibit, addendum or attachment, the Standard Terms and Conditions or the Agreement for Services, as the case may be, shall govern. In the case of conflict or variation between the Standard Terms and Conditions and the Agreement for Services, the Agreement for Services shall govern.

d. *Severability.* If a court holds any term, covenant or condition of this Contract invalid, such holding shall not affect or impair the validity of any other terms, covenants or conditions of this Contract, which the Parties hereby deem severable and which shall remain in full force and effect.

e. *Survival.* Any and all provisions of this Contract which contemplate performance by a Party after the expiration or earlier termination of this Contract shall survive and be enforceable after such expiration or termination, including without limitation provisions relating to ownership of Materials and indemnification.

f. *Waiver.* No one shall or may find, hold or determine that a Party has waived any term, covenant or condition set forth in this Contract, any Event of Default, or any remedy set forth in this Contract, unless that Party has set forth its waiver in a writing signed by that Party.

g. *No Partnership or Agency.* Anything in this Contract to the contrary notwithstanding, including but not limited to any references in Exhibits "A", "B" or "D" to a "partnership" or "partner" relationship, the Parties have not created, do not intend to create, and no Party, nor any other Person, including any court or other tribunal, shall construe anything set forth in this Contract as creating, a joint venture or partnership between the School District and the Contractor with respect to the Work. Neither the

Contractor nor the School District shall have any power to bind the other Party in any manner whatsoever to any third party. The Contractor does not function as an agent of the School District in any dealings with any third party.

h. *No Third Party Beneficiaries.* The Parties do not intend to create, and no Party, court, tribunal or Person shall construe anything set forth in this Contract to create, any contractual relationship with, or to give a claim, right, cause of action or remedy in favor of, any third party against either the School District or the Contractor. The Parties do not intend that anything in this Contract benefit any third party.

i. *Entire Agreement; Amendment.* This Contract includes all exhibits and addenda, if any, referred to herein, all of which the Parties hereby incorporate by reference. This Contract constitutes the entire agreement between the Parties and supersedes all prior and contemporaneous oral and written agreements and statements, all of which the Parties have fully integrated herein. This Contract supersedes any prior or contemporaneous course of conduct, performance or dealing between the Parties. No amendment or modification changing this Contract's scope or terms shall have any force or effect unless executed and delivered in writing and signed by both Parties.

j. *Counterparts.* The Parties may execute and deliver this Contract in any number of counterparts, each of which the Parties shall deem an original, and all of which shall constitute, together, one and the same agreement.

k. *Interpretation; Number, Gender.* The words "herein" "hereof" and "hereunder" and other words of similar import refer to this Contract as a whole, and not to any particular Section, subsection or clause in this Contract. Whenever the context requires, the Parties shall construe words used in the singular to include the plural and vice versa, and pronouns of any gender to include the masculine, feminine and neuter genders.

l. *Time.* Time is of the essence of the Contractor's performance of the Work, including the delivery of any Materials to the School District, under this Contract.

EXHIBIT "D"

School Reform Commission Resolution numbered A-__ dated _____, 2018

EXHIBIT "E"

ATTACHMENT "D"

SCHOOL DISTRICT OF
PHILADELPHIA OFFICE OF
PROCUREMENT SERVICES

MINORITY/WOMAN-OWNED BUSINESS ENTERPRISE (MWBE) PARTICIPATION PLAN FORM

I. Information in this section refers to the Prime Contractor/Vendor.

Company Name _____
Contact Person: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Fax: _____
E-mail: _____
Owner: African-American, Hispanic, Asian, Native American, Woman,
 Non-Profit, Caucasian, Other
Federal Tax ID _____ Certifying Agency: _____
Certification No.: _____
Bid Number or Subject of Resolution: _____

II. Information in this section refers to MWBE firms to be used in the performance of this contract.

Company Name _____
Contact Person: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Fax: _____
E-mail: _____
Owner: African-American, Hispanic, Asian, Native American, Woman,
 Non-Profit, Caucasian, Other
Federal Tax ID _____ Certifying Agency: _____
Certification No.: _____
Description of Work:

Dollar Value \$ _____
Percentage of Total Contract _____
Vendor Signature _____

If no commitment, give reasons and supporting documentation (e.g., evidence of contacting M/WBEs).

I certify that the information provided is true and correct: _____
Authorized Representative

Date: _____

