

**HOJA DE TRAMITE**

**RFP NO: PRDE-OSIATD-FY2018-002-MOBILE DEVICES, PROFESSIONAL DEVELOPMENT AND PROJECT MANAGEMENT**

**SM, INC. PO BOX 50091, TOA BAJA PUERTO RICO, 00950-0091**



**SHEILA M. VÁZQUEZ BENÍQUEZ**  
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787-625-9800 – Office  
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**Due Date: 4:00 p.m. on October 5, 2018**

**Deliver To: José L. Narváz Figuroa**  
Office of Information Systems and Technology Support (OSIATD)  
Puerto Rico Department of Education  
Corrections Building, 4th Floor  
Tte. César González, Esquina Kalaf  
Urb. Industrial Tres Monjitas  
Hato Rey, PR 00926

**Received by: \_\_\_\_\_ in the PRDE**

**CATEGORY 2: PROFESSIONAL DEVELOPMENT CURRICULUM INTEGRATION AND TECHNICAL TRAINING**

## APPENDIX IV: PROPOSAL SUBMITTAL CHECKLIST

ALL SUBMITTALS AND FORMS BELOW ARE REQUIRED AND SHOULD BE INCLUDED WITH EACH PROPOSAL. ANY PROPOSER THAT FAILS TO INCLUDE SUBMITTALS OR FORMS IDENTIFIED AS "MANDATORY" SHALL BE AUTOMATICALLY DISQUALIFIED FROM CONSIDERATION. ANY PROPOSER THAT FAILS TO INCLUDE ANY OTHER NON-MANDATORY SUBMITTALS OR FORMS SHALL BE NOTIFIED AND GIVEN A REASONABLE OPPORTUNITY TO PROVIDE THE MISSING SUBMITTAL OR FORM.

TAB #	DESCRIPTION	FORM	CHECK ✓
TAB 1	Cover Letter		✓
TAB 2	Proposal Signature Page – <i>Mandatory</i>	FORM 1	✓
TAB 3	Equipment and Service Proposal – <i>Mandatory</i>		✓
TAB 4	Sample Price Sheet	FORM 2	✓
TAB 5	Non-Collusion Affidavit – <i>Mandatory</i>	FORM 3	✓
TAB 6	Proposal Bid Bond (15%) - <i>Mandatory</i>		✓
TAB 7	Proposer Questionnaire	FORM 4	✓
TAB 8	Proposer References (3 Minimum)	FORM 5	✓
TAB 9	Designation of Subcontractors	FORM 6	✓
TAB 10	Certificate of Insurance Coverage	FORM 7	✓
TAB 11	Copy of Filed Letter Of Intent	FORM 8	✓
TAB 12	Recent Legal Actions		✓
TAB 13	Service Level Agreement – <i>Mandatory</i>		✓
TAB 14	Bidders Registry – Eligibility Certificate - <i>Mandatory</i>		✓
TAB 15	W-9 (IRS)	FORM 9	✓
TAB 16	Mobile Device Specifications – <i>Mandatory</i>	FORM 10	✓
TAB 17	Device Proposal Functionality Compliance Form - <i>Mandatory</i>	FORM 11	✓
TAB 18	Project Plan and Schedule with Dates for Deployment and Professional Development– <i>Mandatory</i>		✓
TAB 19	Financial Statements - <i>Mandatory</i>		✓
TAB 20	Joint Venture Documentation (If Applicable)		✓

**TAB 1**

**Cover Letter**

**TAB 1: Cover Letter**

Barrio. Palmas 776, calle 7, suite 2  
Cataño, Puerto Rico 00962

October 5, 2018

Sheilla M. Vázquez Benítez  
Director of Finance and Operations  
**SM, INC.**  
PO Box 50091  
Toa Baja, PR00950-0091

**To: José L. Narváez Figueroa**

**COMMITMENT 1:** We are committed to providing the services described in the proposal, under category two: ***PROFESSIONAL DEVELOPMENT CURRICULUM INTEGRATION AND TECHNICAL TRAINING.***

**COMMITMENT 2:** We are committing to *sign to comply, according to contract and with all the requirements proposed by the Department of Education of Puerto Rico*, with the offer of the proposed services, under category two.

**BRIEF NARRATIVE:** The *AulaTec SM Training Project, INC.* It will provide professional development services, curricular integration and technical training. Directed in an integrated way to the daily work exercised by the educator, with his students, in his classroom, the project is in faithful compliance with the normative principles dictated by Federal Affairs and the Department of Education of Puerto Rico. It offers a wide range of face-to-face services ***to train in the use and integration of the services of Laptops and Tablets complemented with information and communication technologies.*** With a high quality offer it presents its services under five modalities: Workshops, Mentoring, Coaching, Classes Demonstration / Webinar and Seminars and Conferences and three core methods: Online, Off-site and Onsite. It proposes a highly validated learning and evaluation transfer model system, to guarantee the experience in the use of technological equipment and technological and curricular integration, in the classroom. Take into account diversity in the student population and its educators; and the entire project is aligned with the Technology Plan, approved in 2015, by the United States of America.

Sincerely,

  
Sheilla M. Vázquez Benítez

**TAB 2**

**Proposal Signature Page – *Mandatory***

**PROPOSAL SUBMITTAL FORM 1 – PROPOSAL SIGNATURE PAGE**

**EACH PROPOSER IS REQUIRED TO SUBMIT A PROPOSAL SIGNATURE PAGE WITH ITS PROPOSAL. ANY PROPOSER THAT FAILS TO DELIVER THE PROPOSAL SIGNATURE PAGE IS AUTOMATICALLY DISQUALIFIED FROM CONSIDERATION FOR AN AWARD**

**PROPOSER:** SM, Inc.

**ADDRESS:** Barrio Palmas 776 calle 7 Ste 2 Cataño, PR 00962

**PHONE:** 787-224-4944

The undersigned, doing business under the full and complete legal name as set forth above, proposes to provide the services described in the Proposer proposal to the Puerto Rico Department of Education, for the prices set forth in the Proposer's Price Proposal. The Proposer makes the following certifications with regard to its service and pricing proposals:

1. Proposer certifies that it has paid unemployment insurance, disability, and chauffeurs social security, in all applicable cases; or, that it has a payment plan for payment of those obligations and is complying with such plan.
2. Proposer certifies that there is no conflict of interest in the contract and provisioning of the proposed services and items to the PRDE.
3. Proposer agrees that its service proposal and price proposal shall remain valid for 180 days from the date of submission.
4. Proposer certifies that none of the employees of the Department or any of its sub-departments or agencies has a pecuniary interest in their offer.
5. Proposer certifies that its proposal has been prepared and developed without collusion with any of the Department's officials or other Proposers and without effort to preclude the Department from obtaining the best competitive proposal.
6. The undersigned, hereby acknowledges receipt of (a) RFP# PRDE-OSIATD-FY2018-002-Mobile Device, Professional Development and Project Management including all appendices, as well as Addenda Nos. 1 (Proposer should list here any and all addenda to the RFP issued by the Department). The undersigned also hereby certifies that the Proposer has read and agrees to abide by the terms and conditions of the RFP including all appendices and addenda.

\* Addenda Num. 5: Extension notice

Signature: 

Name/Title: Sheilla Vázquez Benítez- Finance and Administration Director

Date: October 4, 2018

**TAB 3**

**Equipment and Service Proposal – *Mandatory***

## CATEGORY 2 SERVICES: PROFESSIONAL DEVELOPMENT, CURRICULUM INTEGRATION AND TECHNICAL TRAINING

### 1. GENERAL EXPERIENCE

**INTRODUCTION.** *Formación AulaTec* is a comprehensive initiative of professional development, curriculum integration, and technical training services focuses, in an integrated manner, on the day-to-day work educators carry out in their classrooms. This project offers a broad array of in-person services, complemented by information and communication technologies for a high-quality offering in the modalities authorized by the Department of Education, which requests services of: **Part A Laptops** and **Part B Tablets** to:

- Strengthen students and educators' use and management skills of *laptops, tablets, and carts and accessories for Windows and/or Mac* in the basic subjects of Spanish, Math, English, and Science.
- Offer professional development services to students, educators, and OSIATD staff in the laptop and tablet technology integration, curriculum integration, and differentiated education in the basic subjects of Spanish, Math, English, and Science.
- Take into consideration the *diversity of the student population and their educators*, such as language limitations, learners of Spanish as a second language, learners of English, and special education.
- Provide technical training to the staff of the Office of Information Systems and Technology Support for Teaching (OSIATD, for its Spanish acronym), so they may provide support to schools and educators in the use of *laptops, tablets, and carts and accessories for Windows and/or Mac*.
- Align with the **Technology Plan, approved in 2015 by the United States, the guidelines of the OSIATD** and the goals of the Puerto Rico Department of Education in terms of (1) *improving* student outcomes in academic performance—achieving students' academic development through a diverse, up-to-date, and relevant academic offering; (2) *addressing* the entire student population—promoting among students safe and proper use of information and communication technologies and their integration in basic subjects; and (3) *professionalizing* educators and directors—developing the skills and competencies of a technological educational leader and achieving professional training in technology integration and culture to transform educational settings into spaces that facilitate new learning environments in the classroom.

**GOALS:** Our institution provides an offering firmly anchored in *updating the traditional computer laboratory setting in schools into an innovative environment in each school classroom, where technology is integrated into the curriculum*. Through continuous needs assessment and the application of proven scientific methods based on evidence, this project will address three vital elements of professional development services with three instructional strategies for intervention (technology integration, curriculum integration, and differentiated

education), which will count toward its implementation with a combination of five modalities (mentoring, coaching, demonstration classes/webinars, workshops, and seminars or conferences). The outcome will be the fulfillment of **six core goals**, namely:

1. Improve student learning outcomes;
2. Serve all students;
3. Train educators, students, and OSIATD staff;
4. Evidence outcomes of the professional development system: educators and students;
5. Implement an intervention evaluation system and progress statistics in a programmed and systematized manner;
6. Provide continuous and sustained training in a technology culture for each school as established by the Department of Education to develop capable students.

The work plan for professional development services for educators, students, and OSIATD staff designed by this organization is systematic and has been organized in a rational manner through a sequence of activities and processes based on high-quality services that are relevant to the needs of teachers, students, and schools. **This organization's experience** has proven that a systematic focus as the one proposed not only guarantees the complete, timely, and effective implementation of the activities to fulfill the professional development objectives and the transfer (to the classroom) of the learning experiences acquired by teachers, and the effective evaluation (processes, outcomes, quality, and fidelity) of the initiative but also contribute to continuous needs assessment to integrate and address them as part of the service offering.

**PRINCIPLES:** As illustrated in our flowchart (p. 5), the proposer organization's service offer will be based on the four core principles established in **CATEGORY 2 SERVICES: PROFESSIONAL DEVELOPMENT, CURRICULUM INTEGRATION AND TECHNICAL TRAINING:**

- It will comply with the purposes and regulatory and implementation requirements of the professional development opportunities financed by ***Restart Program Funding***;
- It will be based on the applicable PRDE normative documents, according to the type of school, namely:
  - the Puerto Rico Professional Teaching Standards (2008);
  - the PRDE School Director Profile;
  - the Puerto Rico High School Student Graduate Profile (2012); and
  - the Content Standards and Grade-Level Expectations.

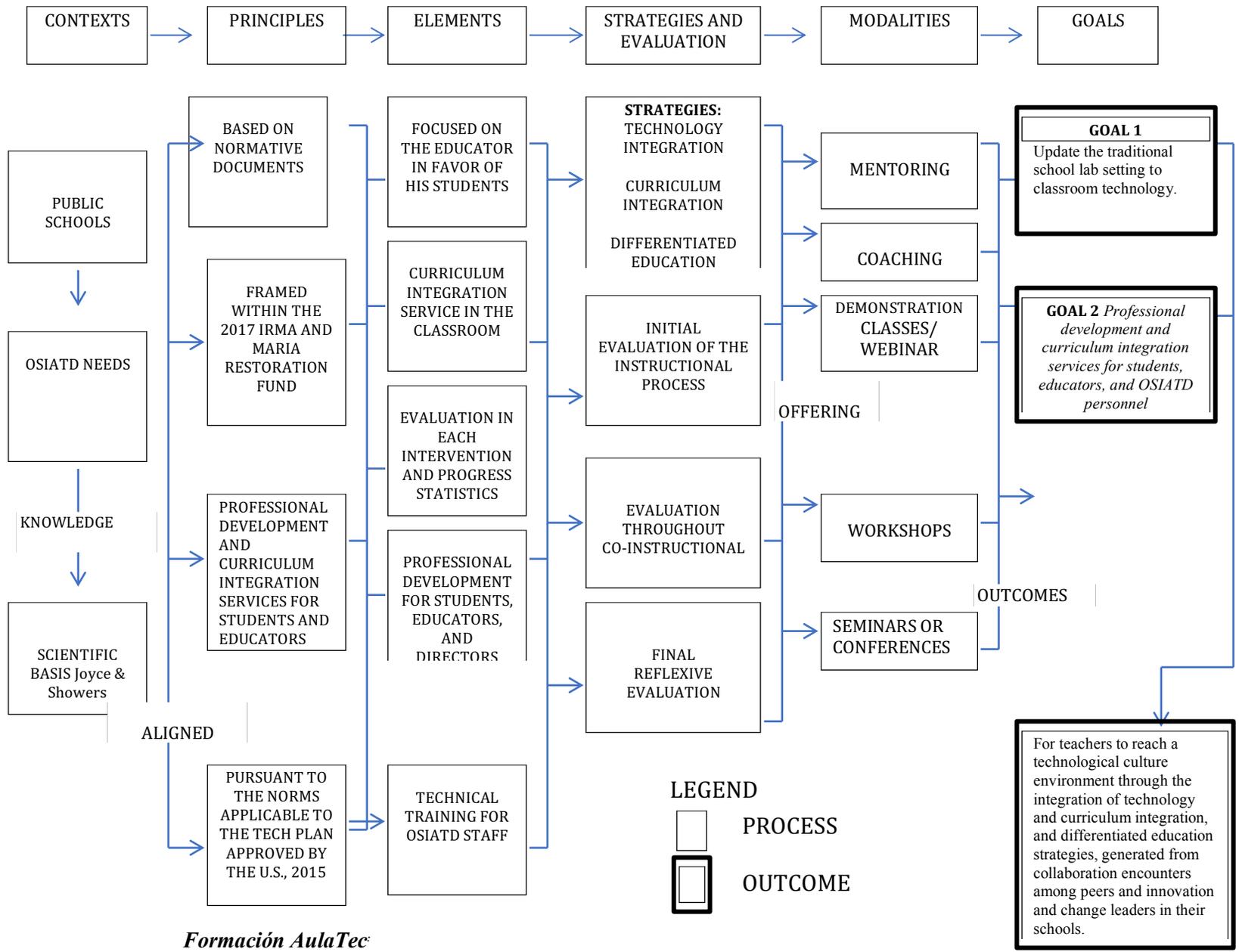
In its implementation, the proposing organization guarantees that all content, strategies, and modalities will respond to the PRDE curriculum; make connections and integrations; have a minimum number of contact hours (according to the modality established by the PRDE); will be relevant to the needs of the populations to be served; will be focused on supporting and evidencing student achievement; will not affect instruction time; will be aligned with the PRDE's goals for school improvement and those that correspond to schools; and will be focused on participants' development of technology integration competencies, integrating three types of knowledge: know-what (knowledge), know-how (skills), and know-to-be (attitudes).

- It will employ a classroom-focused instructional design model to help students, educators, and OSIATD staff to work with the school reality in regard to technology integration.
- The proposed services are aimed mainly at the use and management of laptops and tablets, and the use of cart-and-accessory technological devices for both operating systems and technical training for OSIATD in support to those schools receiving laptops, tablets, and cart-and-accessory technological devices.
- It will provide services that are (1) centered and focused on student outcomes, (2) continuous and sustained, (3) aimed at student achievement, (4) directed at educators' activities in the classroom; (5) focused on individual and collective practice; (6) able to demonstrate their high quality; (7) based on scientific evidence; (8) transferable to the classroom setting; (9) aligned with the requirements of Restart Program Funding and OSIATD, and can validate the *effectiveness and experience* of the proposing organization.
- The design of any experience in SERVICE REQUIREMENTS with their professional development services will be consistent with the theoretical and methodological principles and foundations of education in Puerto Rico, including the Content Standards and the Grade-Level Expectations established by the PRDE and the corresponding use of curriculum materials. This initiative supports and enriches the teaching of the basic subjects, Spanish; Math; Science; and English, and other subjects (e.g. Social Studies and Fine Arts) inasmuch as these develop the concepts, knowledge, skills, and processes of the basic subjects in an integrated manner based on the academic performance standards of the PRDE. Our effective professional development design includes Joyce & Showers' (2002) five components, which are necessary for skill acquisition and use (theoretical and rational presentation, modeling/demonstration, supervised practice opportunities, timely and constructive feedback, and continuous and sustained coaching by their peers or experts).
- It will comply with the accessibility and accommodation requirements of the Rehabilitation Act of 1973 (Section 508), (<http://section508.gov>), which defines how to administer an accessibility program for this population and emphasizes the importance of complying **with (1) analyzing user needs, (2) strongly proposing universal design as the practice, and (3) creating organizational support to deliver products and accessible services.** This organization will comply with these requirements in a consistent manner for its professional development service plans. We are committed with the law as follows: identifying user needs to satisfy them with tests and complying with the policy with a universal accessibility design for everyone from the start of the project through the creation of support for accessible content and following content production stages to ensure that your organization publishes content under these standards.
- They improve curriculum integration with the use of effective educational strategies based on research. All teaching professional development efforts should consider the necessary actions for educators to innovate in their classrooms. (Joyce & Showers, 1988, 2002). When designing development plans, it is important to keep in mind the effective schools paradigm. Effective schools are solidly structured organizations, in which there is a

significant correspondence among objectives, values, and behaviors promoted by the center's management team as well as by each of its professionals.

- Through the **broad participation** of educators, students, and OSIATD staff we will develop our purpose of achieving the committed participation of the school community to fulfill the objective of providing technical training and professional development services to educators and integrate the study plans for the PRDE, by means of a managed services contract in support of the services of the technology plan.
- Finally, it will adapt all the designs of any professional development experience that educators and students have previously had to be consistent with the **regulations applicable to the service requirements**.

The proposer *organization* has prepared a coherent and efficient service offer based on **needs assessment** and the establishment of specific and relevant **goals** for CATEGORY 2 SERVICES: THE PROFESSIONAL DEVELOPMENT, CURRICULUM INTEGRATION, AND TECHNICAL TRAINING that enhance services that comply with the core **principles** of the PRDE, which address five **elements**, and implement at least **three strategies** through **five modalities**, which are all consistent with the norms and expectations established by the PRDE, as illustrated in the following flowchart of the project:



As illustrated in the flowchart in the previous page, the professional services to be offered by the proposer *organization* will be based mainly on the **study of needs** of the different school clusters to serve. Based on these needs, the project will employ proven **scientifically based strategies** supported by specific activities to achieve each of the goals, as shown below:

<b>Goal 1: Update the traditional school computer lab environment to an innovative environment in each school classroom, where technology is integrated into the curriculum</b>	
<b>Scientifically based strategies</b>	<b>Ongoing and comprehensive training for our educators</b>
<p><input type="checkbox"/> <b>Strategies: Technological instruction, curricular instruction, and differentiated education</b> to work in small groups, centers, peer-learning, mini-lessons, and group work.</p> <p><input type="checkbox"/> <b>Instructional evaluation.</b> Recommended to activate prior knowledge. Establish activities to develop meaningful learning through focused lists, questions, graphic organizers, etc.</p>	<ol style="list-style-type: none"> <li>1. Participate in workshops on the basics of the technological equipment acquired and development of accuracy in its use.</li> <li>2. Go to workshops on keyboard use and management, speed, and accuracy for each device, laptop, and tablet.</li> <li>3. Learn the technology services of the school community.</li> <li>4. Enter the current educational model based on technology to develop awareness and skills to solve common and specific technological problems.</li> <li>5. Learn how to use technology responsibly and legally.</li> </ol>
<p><input type="checkbox"/> <b>Strategies: Technological instruction, curricular instruction, and differentiated education</b> to work in small groups, centers, peer-learning, mini-lessons, and group work.</p> <p><input type="checkbox"/> <b>Co-instructional evaluation.</b> It is based on promoting and maintaining an appropriate learning experience for each student. It establishes follow-up activities and simulations to help the learner in his or her experience and learning process.</p>	<ol style="list-style-type: none"> <li>6. Implement intermediate technological equipment workshops for the school and development of accuracy in their use.</li> <li>7. Provide orientation to the school community in terms of the technology services offered for the school and family.</li> <li>8. Offer programs that promote the use and management of technological tools outside the classroom to support academic performance within the classroom.</li> </ol>
<p><input type="checkbox"/> <b>Strategies: Technological instruction, curricular instruction, and differentiated education</b> to work in small groups, centers, peer-learning, mini-lessons, and group work.</p> <p><input type="checkbox"/> <b>Self-assessment.</b> Provide the participant with tools to assess his or her learning process. Analogies, semantic networks, and assessment activities help the learner recognize his or her academic growth and maturity in their learning process.</p>	<ol style="list-style-type: none"> <li>9. Implement advanced technological equipment workshops for the school and development of accuracy in their use.</li> <li>10. Provide orientation to the school community in terms of the technology services offered and their function for the school, family, and district.</li> <li>11. Create activities that help establish differences between technological tools and their modes of adaptation to the objectives, tasks, and needs of the audience.</li> <li>12. Learn to transfer technological knowledge from known to unknown skills and from the technology class to other classes and the home.</li> </ol>

**Goal 2: Offer professional development and curriculum integration services to students, educators, and OSIATD staff**

<i>Scientifically based modalities</i>	<b>Ongoing and comprehensive training for our educators</b>
<p>□ <b>Demonstration classes/Webinars:</b> They are work spaces that address a specific topic by means of a demonstration and can have additional technological elements for permanent collaboration after the first presentation (Área, Sannicolás &amp; Borrás, 2014).</p>	<ol style="list-style-type: none"> <li>2. Provide online on-demand opportunities for educators and students to improve technology skills and content knowledge as well as face-to-face training in large or small groups.</li> <li>3. Support through cloud-based platforms collaboration, content creation, and collaborative activities among schools (using Google apps developed for education).</li> </ol>
<p>□ <b>Seminars or Conferences:</b> Each topic will be offered in a single or several days for a total of six (6) contact hours. They must provide opportunities for building knowledge through interaction and activities. It is important to include supervised sessions with shared participation (professors, students, experts, etc.). The number of participants must not be fewer than 31 and no more than 100 per group. They may be offered as <i>web-based seminars</i>.</p>	<ol style="list-style-type: none"> <li>1. Create digital resources for student learning and teacher training.</li> <li>2. Create innovate learning spaces for all our schools.</li> </ol>
<p>□ <b>Workshops:</b> They are a work methodology that integrates theory and practice. They may last one day or several days. They look for a solution to an instructional event and require face-to-face participation (Betancourt, 1996).</p>	<ol style="list-style-type: none"> <li>5. Develop and maintain integrated planning models that include special education, teaching and learning, and instructional instructors and educators in regard to the selection and implementation of software and hardware.</li> <li>6. Evaluate technological competencies of the teaching personnel.</li> <li>7. Offer instructional strategies to support the transformation of instruction.</li> </ol>
<p>□ <b>Coaching:</b> It is an individual or group process for a maximum of three people, under the responsibility of specialists with vast, recognized experience in education and in the subject/grade level during which <i>coaching</i> will be carried out. It is integrated into the work space, which has the objective of implementing new and effective scientifically proven strategies that are relevant to the classroom setting (Knight, 2007).</p> <p>□ <b>Mentoring:</b> It must be offered continuously and consistently. The mentor must be more experienced than the participant in the academic field for which the service is being offered.</p>	<ol style="list-style-type: none"> <li>8. Professional training for all educators in the integration of technology in the curriculum.</li> <li>9. For all our educators to feel safe in supporting student growth as digital citizens.</li> <li>10. Establish an enriching technology study plan for each level and grade.</li> </ol>

## 2. CONTRACT TERMS

**TERMS AND CONDITIONS.** The professional development services will be aimed at the **particular needs** of educators, students, and OSIATD staff, as defined in the Project Plan and Development Schedule. Our professional development activities meet the **established requirements** for training and professional development since they are based on and highly **adaptable** to the consolidated plans of the schools of each school district, the comprehensive plan of each individual school, and/or the work plans submitted by the English, Math, Spanish, and Science academic programs. In addition, they effectively address the **characteristics of the training and professional development** established as the goal of the programs in *Restart Program Funding*.

The terms and conditions of the contract that this organization will, in accordance with the update process are established in **CATEGORY 2 SERVICES: PROFESSIONAL DEVELOPMENT, CURRICULUM INTEGRATION, AND TECHNICAL TRAINING**, fully and promptly address the assessment tools that we will use. Below you will find the details and options:

Assessment tool	Instructional analysis
Assessment procedure: <ul style="list-style-type: none"> <li>• Conduct a needs assessment to analyze academic achievement data.</li> <li>• Measure school academic performance to determine changes in instructional strategies.</li> <li>• Examine satisfaction and quality to study service and activity impact.</li> <li>• Study data fidelity to validate intervention and modality strategies.</li> </ul>	<ol style="list-style-type: none"> <li>(1) determine the basic technology and technology integration skill levels for the entire teaching staff;</li> <li>(2) validate the current levels of technology integration into the curriculum;</li> <li>(3) identify and address existing barriers and challenges to advancing curriculum and technology integration by discipline, school, and grade level;</li> <li>(4) establish and promote the use of mentor/mentee or principal/peer monitor support models to advance mobile device technology best practices, curriculum, and technology integration process(es) embraced by the Department to promote and ensure that all educators understand district expectations; and, finally,</li> <li>(5) assist the Department in identifying, cataloging, and distributing best practices for mobile technology within the district.</li> </ol>

As part of the instructional analysis conducted, this organization will comply with the **requirements, terms, and conditions** for accessibility and accommodation for the entire population described in the previous table, and, as established in the goal set by the Department of Education supported by this organization, it aims to **update the traditional school computer laboratory setting into an innovative environment in each school classroom, where technology is integrated into the curriculum.**

**BENEFICIARIES: Educators** (including differentiated instruction strategies for Special Education and Spanish-learner educators, **school principals, teaching support staff and students** financed by the federal funds of *Restart Program Funding* and those **designated by the PRDE** pursuant to Title I, Part A, for other school academic activities that impact the school community.

#### **4. SERVICES**

**J. PROFESSIONAL DEVELOPMENT.** This training offer and the scientific model that supports it fully consider the three essential elements of professional development to frame Professional Development and Curriculum Integration Services. Furthermore, it includes a solid scientific basis. Regarding the three elements, our organization's offer is:

- **Focused on educators in service of their students (ELEMENT #1)** Our Professional Development and Curriculum Integration Services: **Formación AulaTec** is a training offer contextualized and anchored in a constructivist paradigm. Its starting point is educators' real needs in service of the needs and strengths of their students in terms of technology integration. We will empower participants with skills, abilities, and attitudes that will translate into better student achievement through the incorporation of communication and information technologies. *We will focus on areas of opportunity for technology integration, expanding the capacity for learning and developing communication through networks, participation, and management of technological resources. From this approach, students receive a class where they may improve their academic achievement, as they master the discipline being taught, achieve technological innovation, and prepare to face the challenges of their grades from a technology integration standpoint* (Prieto & Ugalde, 2013). We will address diversity in terms of styles, methods, and strategies to improve student achievement. We will include differentiated education strategies for the general student population and in Special Education programs. Its application would entail, as stated by Griffin (2010), that teachers be invited to reflect about their professional development as well as exposed to other settings that alter their practice, beliefs, or professional knowledge regarding pedagogical innovation in the classroom.
- **It is aimed at achieving transfer to the classroom setting (ELEMENT #2)**  
Although this is one of the most difficult processes for educators, this link between theory and practice is fundamental for achieving the anticipated student outcomes. It becomes even more difficult if there are radical discrepancies between educators' everyday experiences and the content and pedagogy of the professional development. Joyce and Showers' (2002) scientific model and their effective professional development design are fundamental in our approach, particularly in the design of the professional development activities. *The model includes the five necessary components for skill acquisition and use: (1) theory, (2) demonstration, (3) practice, (4) feedback, and (5) coaching.* As part of the research this organization conducted, Joyce and Showers' (2002) model demonstrates that 5% of teachers will transfer a new skill or teaching strategy to their practice as a result of the theory; 10% will do so as a result of the theory and demonstration or modeling; 20% will do so as a result of theory, demonstration, and simulated practice in the classroom; 25% will do so as a result of theory, demonstration, practice, and feedback on their practice; and 90% will do so as a result of the theory, demonstration, practice, feedback, and coaching. The application of all the professional development experience to which educators, students, school principals, and OSIATD staff will be exposed, this project will consider strategies and modalities to encourage participants to transfer the knowledge and skills acquired during the Professional Development and Curriculum Integration Services: **Formación AulaTec**. As Davenport and Prusak (2009) point

the appropriate combination of theory, demonstration, practice, feedback, and coaching, as well as to **improve student instruction and participation in courses mediated by information and communication technologies**. Fidelity to this scientific knowledge allows us to **articulate an effective professional development project** for all OSIATD staff members, educators, and students of the Puerto Rico Department of Education.

- Our Professional Development offer will include evaluation strategies and methods to document the following **four factors or evaluation inputs**: (1) prior knowledge related to the offer if any (**instructional strategy**); (2) change/acquisition of new knowledge (**co-instructional strategy**); (3) change of attitudes and change of behavior; and (4) reflection of academic processes and outcomes (**reflective strategy**).
- In addition, as part of each evaluation, we will also collect the following types of **feedback**: (1) training content **relevance** to their needs, (2) **satisfaction** with training experience; and (3) **prospective agenda** of topics/needs to be addressed derived from the training experience. Strategy evaluation implies the administration of at least **three instruments** in each meeting: **pre-test and post-test as well as a satisfaction survey**. They will be tabulated to derive an evaluation of the outcomes of the professional development offer based on the above-mentioned criteria. To this end, and as an attachment, we provide examples of the pre-test, post-test, participant satisfaction survey, and description of the strategies and documents that will be used to follow up on the transfer of new knowledge and strategies to the classroom. From the answers of the **pre-test**, we will measure the level of prior knowledge about the core content of the training; the **post-test** will measure acquisition of knowledge and the positive change derived when compared to the pre-test, and the **satisfaction survey** will measure their positive and negative reactions regarding the experience. The **satisfaction survey** will be administered at the end of each training experience using a Likert scale (degrees of agreement/disagreement) for which the participants will respond to statements related to their perception of the **quality** of the training offer and its **relevance** to their needs. The project design guarantees that the Professional Development will answer the five modalities identified: mentoring; coaching; demonstration classes/webinars; workshops; and seminars or conferences.
- **The project design guarantees that the Professional Development responds to the modalities discussed.** Several authors state that the **integrated curriculum** is a necessity to face the challenges and demands of a society in constant change in which globalization and access to new technologies are more common (Yus, 2000). The NCTM establishes that students must understand information and communication technologies (ICT), question, assimilate information, and work in groups to expand their knowledge and have equal opportunities in the workforce (NCTM, 2000).

We will focus in the three methods indicated in *Category 2 Services: Professional, Curriculum Integration and Technical Training Development: Onsite; Online and Off-site*. The proposer *organization* is **experienced and knowledgeable in these three strategies and several other strategies** defined as pertinent to these programs by the PRDE. Although we focus on three core strategies in this offer, if necessary we may also employ other **complementary strategies** such as *web-enhanced and web-supplemented learning methods*

as support methodologies that will also be available. In summary, **the ability of the proposing entity is not limited to only the three core methods** since it has the ability and experience to implement other proven methods if necessary.

**Description of the three core methods to promote Professional Development:** How educators learn and how students learn are two questions that the team of specialists working on this educational and professional development project have asked themselves. Each of them, from their specialization and teaching and research experience, has identified the strengths and pertinence of each method determined by the PRDE. As a result, our professional development initiative **is based on the three core methods to promote professional training to educators and student achievement. Both have a scientific basis as summarized below:**

- **CORE: Onsite training** is becoming more and more of a necessity for organizations around the world, specialized training in accordance with the organization's needs helps teams become more productive and innovative. Onsite training has also grown from just training employees in a specific location to training employees globally via online training which reduces costs and allows multiple branches of the organization to learn together (Perdomo, 2016). Its implementation draws from real and genuine situations from the context and the experience stemming from a real situation may pose a problem that leads to reflection. The implementation requires an instructional design that allows the educator to put into practice the knowledge they have learned in a direct and case-specific manner. Used as a didactic strategy, it is considered relevant if the project methodology aims for **meaningful learning** because it stems from activities that are **relevant** for students and consider objectives and content that go beyond those in the curriculum.
- **CORE: Online learning training** refers to instructional environments supported by the Internet. Online learning comprises a wide variety of programs that use the Internet within and beyond school walls to provide access to instructional materials as well as facilitate interaction among teachers and students. Online learning can be fully online or blended with face-to-face interactions. Each of these approaches is described below (Bakia, Shear, 2012). Its implementation draws from scientifically based strategies: case studies, role-playing, and contextualized learning to support learners in their interface with distance learning methodologies. The implementation requires an instructional design based on methodologies that promote interaction, development within a community, and scientifically based research models among educators. Used with a didactic strategy, it is considered relevant if the project methodology aims for reflexive and meta-cognitive learning because it stems from support activities designed for continuous interaction either synchronously or asynchronously.
- **CORE: Off-site training** is conducted in a location specifically designated for training. It may be near the workplace or away from work, at a special training center or a resort. Conducting the training away from the workplace minimizes distractions and allows trainees to devote their full attention to the material being taught (Gill, 2014). The implementation requires an instructional design with models specific to the reality of each academic situation since, in this type of training, participants need to make more of an effort once they return to their jobs because it represents an intermediate-level of transfer.

**Alignment:** In addition to these three core methods, our professional development offer has aligned each of its goals with their core professional development methods and these, in turn, with their directed activities, which are summarized in the table below.

<b>Goal 2: Offer professional development and curriculum integration services to students, educators, and OSIATD staff</b>	
<b>PDS core methods</b>	<b>Directed activities</b>
<p><input type="checkbox"/> <b>Onsite:</b> it is a method of instruction in which the learning experience is significant. It values approximation to the participants' learning process and the workplace. (CM, 2004).</p>	<p>In <b>small groups</b> and equal in the development of skills  <b>Centers</b> created by areas to give purpose to the experience  <b>Peer learning</b> to advance their learning  <b>Mini-lessons</b> that address specific situations  <b>Enrichment clusters</b> grouped by their inclination to contribute to the development of the goal</p>
<p><input type="checkbox"/> <b>Online:</b> it is the method of instruction in which teaching behaviors occur separately from those of students, so teacher-student communication may be carried out through print texts, electronic or mechanical media, or other techniques (Moore, 1972).</p>	<p><b>Open-source programs</b>  <b>Blog</b> for interesting content  <b>Podcast</b> to share files  <b>Documentaries</b> as an aspect of reality depicted in an audiovisual format  <b>Web Quest</b> structured activity created with web resources</p>
<p><input type="checkbox"/> <b>Off-site:</b> it is a training method that is not carried out in the workplace and may take place in any pertinent place with peers, forums and the possibility of training a group instead of an individual (Rothwell &amp; Kazanas, 1994).</p>	<p><b>Interdisciplinary projects</b> are carried out in groups with a focus on community action  <b>Focus groups</b> provides the opportunity of carrying out projects associated to courses and are evaluated by the school community  The <b>business fair</b> promotes social, economic, and cultural events for products created by students</p>

The Professional Development and Curriculum Integration Services project: **Formación AulaTec** presents a broad variety of curriculum integration, technology integration, and differentiated education services to enrich methods and activities in educators', students', OSIATD staff members' areas of growth.

<b>Part.</b>	<b>Description</b>	<b>Areas of growth in Professional Development and Curriculum Integration Services and training methods</b>
<ul style="list-style-type: none"> <li>• Educator</li> </ul>	<ul style="list-style-type: none"> <li>• They will be provided technological devices, so they may meet the educational and practical objectives in their classrooms as well as work with the design of the lesson plans.</li> </ul>	<p><b>Area: Use and management – Onsite method</b></p> <ol style="list-style-type: none"> <li><b>1. The efficient and effective use of laptops in the classroom</b> In search of academic quality, through technology integration, it proposes laptop interventions to facilitate the work of educators and motivate students in classes.</li> <li><b>2. The efficient and effective use of tablets in the classroom</b> In search of academic quality, through technology integration, it proposes interventions with tablets to facilitate the work of educators and motivate students in classes.</li> </ol> <p><b>Area: Technology integration – Online method</b></p> <ol style="list-style-type: none"> <li><b>3. The development of a technological culture in public schools</b> Sustained dialogue about the employment of technology in teaching practice. Conduct a diagnostic test to establish the goal and favor a technological culture.</li> <li><b>4. The role of technology in the current school context</b> How does the educator consider the use of technology? What level of integration are they using? We analyze the influence in the school and propose innovative integration models.</li> <li><b>5. What is the level of integration proposed by the carts and accessories?</b> Explore technology integration methods to support teacher planning and visually illustrate concepts under study to benefit student learning.</li> </ol> <p><b>Area: Planning – Online method or Onsite method</b></p> <ol style="list-style-type: none"> <li><b>6. The academic foundation for technological services in the school</b> Study a series of innovative projects with technologies at the school and their link to student and educator academic success. Create an acquis of keys to success.</li> <li><b>7. How to teach with technology? Uses and possibilities in the classroom</b> It will take into account the benefits of emerging technology without disregarding modes of integration that include coaching and the support of classmates and the educator.</li> <li><b>8. The teaching challenge: how to evaluate when to integrate technology</b> Study evaluation models and prepare check lists that guide the teacher in the process of evaluating technological competences and their students' knowledge.</li> <li><b>9. Technological resources to favor student learning</b> It will analyze technology initiatives presented for education and their objectives to carry out correspondence exercises with each technological tool.</li> </ol>
<ul style="list-style-type: none"> <li>• Student</li> </ul>	<ul style="list-style-type: none"> <li>• They will receive a mobile digital interactive device.</li> </ul>	<p><b>Area: Use and management - Online method or Onsite method</b></p> <ol style="list-style-type: none"> <li><b>10. Student technological competencies</b> Guide teachers on the benefits of technology for students: technical knowledge, access to information, communication, differentiated education, etc.</li> </ol> <p><b>Area: Technology integration – Online method or onsite method</b></p> <ol style="list-style-type: none"> <li><b>11. Technology for education: its integration in the classroom</b> Laptops, tablets, and ICT apps are 21<sup>st</sup>-century learning tools, and teachers will receive training to recognize their benefits for meaningful learning.</li> </ol> <p><b>Area: Technological culture – Online method or onsite method</b></p> <ol style="list-style-type: none"> <li><b>12. The advantages of studying with new technologies</b> Explain the margin of knowledge, the learning environment, and student benefits in participatory meetings.</li> </ol>

<ul style="list-style-type: none"> <li>• Student</li> </ul>	<ul style="list-style-type: none"> <li>• They will receive a mobile, digital interactive device.</li> </ul>	<p><b>Area: Use and management - Online method or Onsite method</b></p> <p><b>13. Student technological competencies</b> Guide teachers on the benefits of technology for students: technical knowledge, access to information, communication, differentiated education, etc.</p> <p><b>Area: Technology integration – Online method or onsite method</b></p> <p><b>14. Technology for education: its integration in the classroom</b> Laptops, tablets, and ICT apps are 21st-century learning tools, and teachers will receive training to recognize their benefits for meaningful learning.</p> <p><b>Area: Technological culture – Online method or onsite method</b></p> <p><b>15. The advantages of studying with new technologies</b> Explain how they expand the margin of knowledge, update learning environments into participatory encounters, and benefit students' learning experience.</p>
<ul style="list-style-type: none"> <li>• Special Education</li> </ul>	<ul style="list-style-type: none"> <li>• Educators of special education students with visual, hearing, mobility, communication, and cognitive difficulties will receive equipment.</li> </ul>	<p><b>Training adjusted with reasonable accommodation in service of the applicable technical and functional performance criteria - Off-site method</b></p> <p><b>16. Teacher technological competencies</b> Teachers will receive training on instructional strategies and the analysis of technological tools to draft learning goals per technology adopted.</p> <p><b>17. What is assistive technology?</b> Present the services that assistive technology offers and the benefits to improve or replace people's limitations in their performance.</p>
<ul style="list-style-type: none"> <li>• Language</li> <li>• Limitation</li> </ul>	<ul style="list-style-type: none"> <li>• Educators of English learners and students with language limitations who meet the identified need will receive equipment.</li> </ul>	<p><b>Training adjusted to fit the needs of students and educators with specialists and communication difficulties given their lack of mastery in understanding, communicating, and writing in both languages. - Off-site method</b></p> <p><b>18. Measuring and evaluating information technologies</b> Examine technological tools, according to their alignment to teaching excellence standards and the requirements of the plan endorsed by the DE.</p> <p><b>19. Media and technology in education</b> Expose teachers, students, and OSIATD staff to a culture of proper use of mobile devices and to the development of high-impact multimedia projects that work with the principles of proper communication.</p>
<ul style="list-style-type: none"> <li>• OSIATD</li> </ul>	<ul style="list-style-type: none"> <li>• The personnel of this office works at the central level in the Department of Education. Its main function is to support and work with the technical operation and serve as link to the school districts.</li> </ul>	<p><b>Area: Technical training - Off-site method or Onsite method</b></p> <p><b>20. Technical knowledge for educators and OSIATD staff</b> Form a support network between educators and OSIATD staff to create protocols.</p> <p><b>Area: Use and management - Off-site method or Onsite method</b></p> <p><b>21. Schools and districts in search of a technological culture</b> Explore all initiatives taken in school districts to identify effective principles of technology integration and analyze how they help reinvention.</p> <p><b>Area: Support and technical services - Off-site method or Onsite method</b></p> <p><b>22. Policies, norms, and procedures to administer technology in schools</b> They will be trained in drafting a technology manual, and they will study instructional models for their use and management, and guide users and communication with the OSIATD staff.</p> <p><b>23. How to implement protocols to promote support and communication services?</b> Encourage professional conversation spaces with innovative activities for the community, families, and school district.</p>

**K. CURRICULUM INTEGRATION AND INSTRUCTION.** This training offer and the scientific model upon which it is based fully consider three scientific strategies: the **technology integration strategy**, which is the instructional design in rigorous didactic units to encourage a high level of execution among students and must correspond to each student's academic achievement; the **curriculum integration strategy**, which contextualizes learning through meaningful experiences and authentic processes, and proposes learning in an integrated manner; and **differentiated Education**, which consists of adapting the system and method of applying instruction to each student and differentiates the content, the processes, and the learning environment from the continuous evaluation of students and their academic performance. For the established professional development plan, these are the three essential strategies to frame the Professional Development and Curriculum Integration Services. Furthermore, it includes a solid scientific basis to promote educators to carry out their work as teachers, considering the effective use and integration of communication and information technology in the classroom.

The implementation of the three strategies occurs using the design model *based on* the scientific model of transfer of learning to the classroom by Joyce and Showers (2002), which, like the scientific model proven by Ball and Cohen (1999), renowned researchers in the roles of learning and their theory based on the practice of professional education show, in essence, that knowledge about teaching must be learned in classroom practice, according to students' indications when interacting with them and specific ideas as well as particular day-to-day circumstances.

With the *curriculum integration of instruction* and practice of Joyce and Showers' (2002) **scientific basis** with the emphasis of the *Formación AulaTec* initiative, this *organization* proposes to **achieve transfer** to the classroom with instructional resources and with a **working approach that follows an instructional process from the perspective of curriculum integration and technology integration**. Through this model, the organization will determine the resources that will be used to ensure that educators and students master the technology skills, and successfully use and manage the technological tools in the classroom.

Combined with the transfer of learning to the classroom, this organization recognizes that educators should ask themselves a series of questions following the implementation of nine elements which offer and sustain curriculum integration and the development of a technological culture in the classroom: What level of preparation do students require to meet the objective? What strategy supports the objective and students' needs? What resources or media may be used to develop the learning experience? What type of instructional support do I need for learning to be successful? How do I determine that the assessment is yielding results? These five questions are essential for planning and supporting the technology integration process and identifying the assessment tools to use in the classroom. The nine elements to facilitate a technological culture environment, integrated curriculum, and instruction in the classroom continuously and steadily:

- (1) identify the instructional problem and put it in context in relation to the goal;
- (2) analyze student characteristics to determine the selection of instructional strategies;
- (3) identify the content and analyze each of component of the related task with its objectives and purpose;
- (4) specify the instructional objectives;
- (5) organize the content in units of instruction to establish logical learning;

- (6) adapt the instructional strategies, so each student may master the objectives;
- (7) plan the text and develop it;
- (8) develop evaluation instruments for the objectives; and
- (9) select resources to support instructional and learning activities.

This nine-element mode of implementation is by cycles and will be employed with support and associated activities to ensure the link to the goals of the project. With this work tool, educators may start at any point during the week and continue following any instructional order. This is very important because it guarantees that schools may begin with some educators who are ready to install technological resources in the classroom and deliver the mobile technological devices to teachers and students.

The **Formación AulaTec** project works with **CURRICULUM INTEGRATION AND INSTRUCTION** in two instruments to make the transfer and enrich the learning process of all participants.

**Attachment Example 1: Examples of the descriptions of strategies and documents that will be used to follow up the transfer to curriculum integration and instruction.**

*Sheet 1: Transfer of new knowledge and strategies to the classroom*

**Purpose:** Measure participant satisfaction.

**Model:** Joyce & Showers (2002)

Areas	Importance				Satisfaction			
	Not important		Very important		Unsatisfied		Very satisfied	
<b>Immediate reaction following the activity</b>	1	2	3	4	1	2	3	4
1. Was the professional development activity relevant?	5				5			
<b>Implementation of learning</b>	Not important		Very important		Unsatisfied		Very satisfied	
2. Did your professional practice change as a result of the training?	1	2	3	4	1	2	3	4
3. What were the pros and cons of the implementation?	5				5			
<b>Student outcomes</b>	Not important		Very important		Unsatisfied		Very satisfied	
4. Did the students modify their behavior towards learning as a result of the activity?	1	2	3	4	1	2	3	4
	5				5			

## Attachment Example 2: Form to follow up on the transfer of new knowledge and strategies to the classroom

**Sheet 2:** *Transfer of new knowledge and strategies to the classroom*

**Purpose:** *Analyze follow-up and progress.*

**Model:** *Joyce & Showers (2002); Moye (1996) (Moye, 1996, as cited in Santiago & Custodio, n.d.)*

Model components	Skill acquisition and use	Six levels of transfer of innovation to the classroom	Levels of implementation
1. <i>Theoretical presentation</i>	List of skills and/or competencies for teacher training	<input type="checkbox"/> Overlooking: do they persist to do things like before? <input type="checkbox"/> Duplicating: do they duplicate without any changes? <input type="checkbox"/> Replicating: do they adapt but only apply the knowledge to similar situations? <input type="checkbox"/> Integrating: do they subtly combine knowledge with other ideas and situations? <input type="checkbox"/> Mapping: do they transfer the strategy to other content and real-life situations? <input type="checkbox"/> Innovating: do they take the ideas beyond their initial concept?	<input type="checkbox"/> Individual: no peer structure 5-10% <input type="checkbox"/> Teams – between peers: >75% <input type="checkbox"/> By the entire school faculty with <i>coaching</i> teams between peers 90-100%
2. <i>Modeling/demonstration</i>		<input type="checkbox"/> Overlooking: do they persist to do things like before? <input type="checkbox"/> Duplicating: do they duplicate without any changes? <input type="checkbox"/> Replicating: do they adapt but only apply the knowledge to similar situations? <input type="checkbox"/> Integrating: do they subtly combine knowledge with other ideas and situations? <input type="checkbox"/> Mapping: do they transfer the strategy to other content and real-life situations? <input type="checkbox"/> Innovating: do they take the ideas beyond their initial concept?	<input type="checkbox"/> Individual: no peer structure 5-10% <input type="checkbox"/> Teams – between peers: >75% <input type="checkbox"/> By the entire school faculty with <i>coaching</i> teams between peers 90-100%
3. <i>Supervised practice opportunities</i>		<input type="checkbox"/> Overlooking: do they persist to do things like before? <input type="checkbox"/> Duplicating: do they duplicate without any changes? <input type="checkbox"/> Replicating: do they adapt but only apply the knowledge to similar situations? <input type="checkbox"/> Integrating: do they subtly combine knowledge with other ideas and situations? <input type="checkbox"/> Mapping: do they transfer the strategy to other content and real-life situations? <input type="checkbox"/> Innovating: do they take the ideas beyond their initial concept?	<input type="checkbox"/> Individual: no peer structure 5-10% <input type="checkbox"/> Teams – between peers: >75% <input type="checkbox"/> By the entire school faculty with <i>coaching</i> teams between peers 90-100%

<p>4. <i>Timely and constructive feedback</i></p>		<ul style="list-style-type: none"> <li><input type="checkbox"/>Overlooking: do they persist to do things like before?</li> <li><input type="checkbox"/>Duplicating: do they duplicate without any changes?</li> <li><input type="checkbox"/>Replicating: do they adapt but only apply the knowledge to similar situations?</li> <li><input type="checkbox"/>Integrating: do they subtly combine knowledge with other ideas and situations?</li> <li><input type="checkbox"/>Mapping: do they transfer the strategy to other content and real-life situations?</li> <li><input type="checkbox"/>Innovating: do they take the ideas beyond their initial concept?</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/>Individual: no peer structure 5-10%</li> <li><input type="checkbox"/>Teams – between peers: &gt;75%</li> <li><input type="checkbox"/>By the entire school faculty with <i>coaching</i> teams between peers 90-100%</li> </ul>
<p>5. <i>Continuous and sustained coaching</i></p>		<ul style="list-style-type: none"> <li><input type="checkbox"/>Overlooking: do they persist to do things like before?</li> <li><input type="checkbox"/>Duplicating: do they duplicate without any changes?</li> <li><input type="checkbox"/>Replicating: do they adapt but only apply the knowledge to similar situations?</li> <li><input type="checkbox"/>Integrating: do they subtly combine knowledge with other ideas and situations?</li> <li><input type="checkbox"/>Mapping: do they transfer the strategy to other content and real-life situations?</li> <li><input type="checkbox"/>Innovating: do they take the ideas beyond their initial concept?</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/>Individual: no peer structure 5-10%</li> <li><input type="checkbox"/>Teams – between peers: &gt;75%</li> <li><input type="checkbox"/>By the entire school faculty with <i>coaching</i> teams between peers 90-100%</li> </ul>

*Formación AulaTec*

### Attachment Example 3: Pre-test and Post-Test

*Sheet 1: Transfer of new knowledge and strategies to the classroom*

**Purpose:** *Measure of the acquisition and transfer of new knowledge*

**Model:** *Instructional, Co-instructional and Reflexive Evaluation*

Title: Online Technological and Research Resources

\_\_\_\_\_ **Pre-test**

\_\_\_\_\_ **Post-test**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Multiple Choice.** Read each of the statements and choose the correct answer. Write the letter of the option you chose in the space provided.

- \_\_\_ 1. A technological resource refers to:
- encouraging the use of the scientific method.
  - any technological device used to meet a need.
  - systems of information.
  - word processors that we use to work in the computer.
- \_\_\_ 2. Research is a process that:
- is variable and used to generate information.
  - applies the Frayer method.
  - is systematic method of data collection and analysis with a specific purpose.
  - demonstrates mastery of technological resources.
- \_\_\_ 3. The scientific method is:
- a systematic and organized model that looks for answers to a problem.
  - an activity aimed at scientists to find answers.
  - a combination of science and technology to do research.
  - a free model to generate answers for existing problems.
- \_\_\_ 4. The step of the scientific method that generates a possible answer is the:
- statement of the problem.
  - conclusion.
  - hypothesis.
  - observation.
- \_\_\_ 5. Web Quest is a strategy that promotes:
- collaborative teaching using the scientific method.
  - the search for information.
  - collaboration among the scientific community.
  - online research.

**Strategy Evaluation:** As required and stated in Element #3 (Evaluation of each professional development intervention), our professional development offer will use three strategies, technology integration; curriculum integration; and differentiated education, and three methods of evaluation, **instructional evaluation; co-instructional evaluation; and reflexive evaluation**, to document the following four factors or evaluation inputs:

1. **Prior** knowledge related to the offer, if any;
2. Change/acquisition of new **knowledge**;
3. Change of **attitudes**; and
4. Change of **behaviors**.

In addition, as part of each evaluation, we will also collect the following information:

1. **relevance** of the training content to participant needs;
2. **satisfaction** with training experience; and
3. **prospective agenda** of topics/needs to address derived from the training experience.

Strategy evaluation implies the administration of at least **three instruments** in each modality: a **pre-test and post-test as well as a satisfaction survey**. They will be tabulated to derive an evaluation of the outcomes of the professional development offer based on the above-mentioned criteria. To this end and as an appendix, we provide, as required, examples of the participant satisfaction survey instruments and transfer to classroom forms. The satisfaction survey will be administered at the end of each training experience using a Likert scale (degrees of agreement/disagreement) for which the participants will respond to statements related to their perception of the quality of the training offer and its relevance to their needs. We will provide additional space for general comments related to the training experience to highlight those things that participants liked the most, and those they consider should be improved upon; we will invite participants to suggest new topics or content to address in the future as a result of their training experience. Analysis of the evaluations will be the responsibility of the staff of the proposer organization.

The system of evaluation (**instructional evaluation, co-instructional evaluation, and reflexive evaluation**) proposed by this organization *promotes constant identification of the needs of educators and students regarding the use and integration of information and communication technologies* and establishes alignment strategies with a continuous and sustained professional development that will benefit everyone. The table below details the implementation of the evaluation system and how the administration of the evaluation according to the intervention in the professional development (before training), co-instructional (during), and reflexive (after) both in-person and supported by technological resources.

<b>Instructional evaluation</b>	<b>Co-instructional evaluation</b>	<b>Reflexive evaluation</b>
Meaningful learning	Meaningful learning	Meaningful learning
<ul style="list-style-type: none"> <li>• The essential question</li> <li>• Brainstorming</li> <li>• Graphic organizers</li> <li>• Focused listing</li> </ul>	<ul style="list-style-type: none"> <li>• Concept maps</li> <li>• Guiding questions</li> <li>• Experiences</li> <li>• Labs</li> <li>• Exhibits</li> <li>• Consultations</li> </ul>	<ul style="list-style-type: none"> <li>• Concept maps</li> <li>• Team consultation workshops</li> <li>• Rubrics</li> </ul>

Technological support	Technological support	Technological support
<ul style="list-style-type: none"> <li><input type="checkbox"/> Videos</li> <li><input type="checkbox"/> Web 2.0</li> <li><input type="checkbox"/> Edmodo</li> <li><input type="checkbox"/> LMS (Learning Management System) <ul style="list-style-type: none"> <li>or Forums</li> <li>or Content</li> <li>or Communication</li> </ul> </li> <li><input type="checkbox"/> Smartphones</li> <li><input type="checkbox"/> Apps (Web-based or Smartphones -iOS, Android)</li> <li><input type="checkbox"/> Concept maps <ul style="list-style-type: none"> <li>or CmapTools</li> <li>or Ideament</li> <li>or Draw.io</li> <li>or DrawAnywhere</li> </ul> </li> <li><input type="checkbox"/> AnswerGarden</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Apps (Web-based or Smartphones -iOS, Android)</li> <li>–</li> <li><input type="checkbox"/> Web 2.0</li> <li><input type="checkbox"/> Edmodo</li> <li><input type="checkbox"/> Concept maps <ul style="list-style-type: none"> <li>or CmapTools</li> <li>or Ideament</li> <li>or Draw.io</li> <li>or DrawAnywhere</li> </ul> </li> <li><input type="checkbox"/> Cloud-based apps: <ul style="list-style-type: none"> <li>or Spreadsheet</li> <li>or Word processor</li> <li>or Presentation tools</li> </ul> </li> <li>Drive</li> <li><input type="checkbox"/> LMS (Learning Management System) <ul style="list-style-type: none"> <li>or Forums</li> <li>or Content</li> <li>or Communication</li> </ul> </li> <li><input type="checkbox"/> Virtual labs: simulations</li> <li><input type="checkbox"/> Search engines</li> <li><input type="checkbox"/> WebQuest</li> <li>• YouTube</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> WebQuest</li> <li><input type="checkbox"/> Edmodo</li> <li><input type="checkbox"/> Plickers</li> <li><input type="checkbox"/> RubiStar</li> <li><input type="checkbox"/> Kahoot</li> <li><input type="checkbox"/> Socrative</li> <li><input type="checkbox"/> Powtoon</li> <li><input type="checkbox"/> ClassKick</li> <li><input type="checkbox"/> Playposit</li> <li><input type="checkbox"/> LMS (Learning Management System) <ul style="list-style-type: none"> <li>or Tests</li> <li>or Assessment</li> </ul> </li> <li><input type="checkbox"/> Concept maps <ul style="list-style-type: none"> <li>or CmapTools</li> <li>or Ideament</li> <li>or Draw.io</li> <li>or DrawAnywhere</li> </ul> </li> </ul>

## **5. PROJECT PLAN AND DEPLOYMENT SCHEDULE**

**GOAL 1:** Update the traditional school computer lab environment to an innovative environment in each school classroom, where technology is integrated to the curriculum.

**SCOPE:** Design and develop a personalized plan for all (100%) of the participating schools during the 2018-2019 academic year, based on the *methods and resources that will help educators of the Department of Education to master the fundamental skills and required tools to succeed in integrating technology to students' learning processes.*

**RANGE:1.** Explain **Formación AulaTec:** modalities, strategies, transfer, and evaluation. **1<sup>st</sup> trimester 10 weeks.**

**RANGE:2.** Use and management of equipment, mobile devices, technology integration, and curriculum integration. **2<sup>nd</sup> trimester 10 weeks**

**RANGE:3.** Create a culture of technological instruction and create a teacher mentoring program. **3<sup>rd</sup> trimester 10 weeks.**

<b>Objectives</b>	<b>Activities</b>	<b>Compliance: task and date</b>	<b>Personnel Responsible</b>	<b>Evaluation Instrument</b>
<p>1. Establish an <b>assistance program for the use and management of technology and technology integration to help the Department of Education identify, catalog, and distribute best practices for mobile technology within the district.</b></p> <p>2. Establish a <b>technology literacy program for mobile devices, curriculum integration, and technology integration process adopted by the DE; and promote and ensure that all educators understand the district expectations.</b></p>	<p><b>1.1 Discuss</b> the Formación AulaTec project.</p> <p><b>1.2 Identify</b> specialists who communicate the interests of educators regarding the methods of technology use and integration.</p> <p><b>1.3 Evaluate</b> the technology efforts made and determine their level of effectiveness.</p> <p><b>1.4 Create</b> an intervention, practice, support, and activity catalog for technology use and integration once the assistance program starts.</p> <p><b>2.1 Assess</b> the information literacy needs of teaching community.</p> <p><b>2.2 Draft</b> protocols and expectations to meet the levels of curriculum integration.</p> <p><b>2.3 Survey</b> interests, talents, skills, attitudes, and inclinations to offer technology and technology integration services in the school.</p>	<p><b><u>1<sup>st</sup> trimester Nov. 29 - Jan. 4 2019:</u></b></p> <ul style="list-style-type: none"> <li>• Study the Comprehensive School Plan and the Work Plan.</li> <li>• Disseminate the goals and objectives of the <b>Formación AulaTec</b> project to the teaching community.</li> <li>• Research the intervention strategies mentioned in the <b>Formación AulaTec</b> project.</li> <li>• Create work committees to address the coordination of the curriculum, instruction, technology, equipment, and other areas.</li> <li>• Analyze academic achievement data: META-PR.</li> <li>• Administer and tabulate needs assessment: academic and technological skills.</li> <li>• Form a committee for communication and publication</li> <li>• Establish communication protocols with OSIATD.</li> </ul>	<ul style="list-style-type: none"> <li>• School Director</li> <li>• OSIATD Staff</li> <li>• Project Director</li> <li>• Project Coordinator</li> <li>• Teacher Coordinators</li> <li>• Family Committees</li> <li>• Community Members</li> <li>• Community leaders bringing needs related to technology use and management and technology integration</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation sheets</li> <li>• Group logs on their participation in technology projects</li> <li>• Progress reports</li> <li>• Attendance to the program in question</li> <li>• Implementation management techniques to evidence the effect of the intervention in professional development (use any sheet or document for this purpose)</li> <li>• Intervention evaluation and progress statistics</li> </ul>

Objectives	Activities	Compliance: task and date	Personnel Responsible	Evaluation Instrument
<p>3. Establish a <i>curriculum and technology integration program to determine the basic technology and technology integration skills of the entire teaching staff.</i></p> <p>4. Provide a <b>technology services program to identify and address existing barriers and challenges to advancing curriculum and technology integration by discipline, school, and grade level.</b></p>	<p><b>3.1 Expose</b> educators to activities that aid their teaching experiences.</p> <p><b>3.2 Create</b> a series of activities to promote sustained and systematic technology integration.</p> <p><b>4.1 Implement</b> integration phases for the three instructional strategies: technology, curriculum, and differentiated education.</p> <p><b>4.2 Document</b> existing technology and curriculum integration challenges by discipline and grade level to keep educators forewarned.</p>	<p><u><b>2<sup>nd</sup> trimester Jan. 7 - Mar. 15 2019</b></u></p> <ul style="list-style-type: none"> <li>• Start the professional development workshop program for teachers and students.</li> <li>• Register participation.</li> <li>• Implement classroom learning transfer sheets.</li> <li>• Create technology support networks and recruit participants.</li> <li>• Create synchronous communication spaces (using suggestion boxes, query emails, etc.).</li> <li>• Establish communication protocols with OSIATD.</li> </ul>	<ul style="list-style-type: none"> <li>• School Director</li> <li>• OSIATD Staff</li> <li>• Project Director</li> <li>• Project Coordinator</li> <li>• Teacher Coordinators</li> <li>• Family Committees</li> <li>• Community Members</li> <li>• Community leaders bringing needs related to technology use and management and technology integration</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation sheets</li> <li>• Group logs on their participation in technology projects</li> <li>• Progress reports</li> <li>• Attendance to the program in question</li> <li>• Implementation management techniques to evidence the effect of the intervention in professional development (use any sheet or document for this purpose)</li> <li>• Intervention evaluation and progress statistics</li> </ul>
Objectives	Activities	Compliance: task and date	Personnel Responsible	Evaluation Instrument
<p>5. Foster awareness among the teaching community regarding a <b>focus on a technological culture to validate the current levels of technology integration into the curriculum of each discipline and grade level.</b></p> <p>6. Provide a program <b>aimed at technology integration to establish and promote the use of mentor/mentee to monitor support models to advance technology best practices.</b></p>	<p><b>5.1 Analyze</b> the needs of the teaching community to favor technology integration activities.</p> <p><b>5.2 Create</b> encounters between educators to form learning communities based on their interests and promote a technology integration culture.</p> <p><b>6.1 Recruit</b> educators who may serve as mentors and expose them to activities related to these purposes.</p> <p><b>6.2 Provide orientation and raise awareness</b> among the community on evaluation interventions for models and strategies to remain empowered over their own knowledge.</p>	<p><u><b>3<sup>rd</sup> trimester Mar. 18 – Jun. 7 2019</b></u></p> <ul style="list-style-type: none"> <li>• Continue the professional development workshop program with sporadic online meetings.</li> <li>• Implement transfer sheets.</li> <li>• Measure participants' perceptions of professional development satisfaction and quality.</li> <li>• Obtain educator and student performance and proficiency metrics.</li> <li>• Create learning communities and recruit participants.</li> <li>• Establish communication protocols with OSIATD.</li> </ul>	<ul style="list-style-type: none"> <li>• School Director</li> <li>• OSIATD Staff</li> <li>• Project Director</li> <li>• Project Coordinator</li> <li>• Teacher Coordinators</li> <li>• Family Committees</li> <li>• Community Members</li> <li>• Community leaders bringing needs related to technology use and management and technology integration</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation sheets</li> <li>• Group logs on their participation in technology projects</li> <li>• Progress reports</li> <li>• Attendance to the program in question</li> <li>• Implementation management techniques to evidence the effect of the intervention in professional development (use any sheet or document for this purpose)</li> <li>• Intervention evaluation and progress statistics</li> </ul>

**GOAL 2:** Offer professional development and curriculum integration services to students, educators, and OSIATD staff.

**SCOPE:** Design and develop a personalized plan for all (100%) of the participating schools during the 2018-2019 academic year, based on the *methods and resources that will help educators of the Department of Education to master the process of integrating technology and curriculum integration strategies to succeed in the use and management of the acquired technological devices.*

**RANGE:** Explain **Formación AulaTec and its online component** and/or supplementary access technologies through mobile devices. Offer professional development using case study and meaningful learning strategies, and create with educators, students, and OSIATD staff projects based on technology use and management, and technology and instruction integration. **4<sup>th</sup> trimester 10 weeks.**

Objectives	Activities	Compliance: task and date	Personnel Responsible	Evaluation Instrument
<p>1. Implement a sustained professional development program on:</p> <ul style="list-style-type: none"> <li>• <i>devices for educators;</i></li> <li>• <i>Windows, OneNote, and Office 365 applications</i></li> <li>• <i>and classroom management apps.</i></li> </ul> <p>2. Design and practice the professional development <b>online and complement it with web activities to achieve asynchronous online interaction and employing learning communities.</b></p>	<p><b>1.1 Establish</b> in the teaching community levels (intermediate and advanced) of the training program to:</p> <ul style="list-style-type: none"> <li>• Use and manage laptops and tablets</li> <li>• Technology integration and curriculum integration</li> </ul> <p><b>1.2 Master</b> the service protocol (educators and OSIATD staff) with Windows, OneNote, and Office 365 apps.</p> <p><b>1.3 Publish</b> the study and in-depth analysis conducted by the teaching team regarding classroom management apps.</p> <p><b>2.1 Promote</b> a campaign to change from a traditional educational paradigm to an innovative paradigm mediated by technology.</p> <p><b>2.2 Create</b> participation profiles for educators and students and measure their logins to online professional development programs.</p>	<p><u><b>4<sup>th</sup> trimester Aug. 5 – Oct. 11 2019</b></u></p> <ul style="list-style-type: none"> <li>• Measure participants' academic performance.</li> <li>• Promote an online professional development program.</li> <li>• Create web-based activities of synchronic interest with suggestions for open source apps for educators to integrate these tools to the classroom.</li> <li>• Study using digital materials as part of their professional development.</li> <li>• Establish communication protocols with OSIATD.</li> </ul>	<ul style="list-style-type: none"> <li>• School Director</li> <li>• OSIATD Staff</li> <li>• Project Director</li> <li>• Project Coordinator</li> <li>• Teacher Coordinators</li> <li>• Family Committees</li> <li>• Community Members</li> <li>• Community leaders bringing needs related to technology use and management and technology integration</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation sheets</li> <li>• Group logs on their participation in technology projects</li> <li>• Progress reports</li> <li>• Attendance to the program in question</li> <li>• Implementation management techniques to evidence the effect of the intervention in professional development (use any sheet or document for this purpose)</li> <li>• Intervention evaluation and progress statistics</li> </ul>

Concurrently with the system of evaluation, the **Project Plan and Deployment Schedule** ensure continuous and systematic inspection of the **Formación AulaTec** project to ensure strict and thorough quality control of the *professional development process in the use and management of technological devices and technology integration, curriculum integration, and instruction*. *The purpose* of the **Project Plan** is to prevent non-compliance through the timely detection of situations to implement immediately programmatic and administrative modifications and adaptations that will ensure the fulfillment of all the goals and objectives, and the optimum performance of human and fiscal resources. *It has its own periodic collection and data analysis protocols to monitor the progress of the project and how it draws closer to achieving the annual outcomes*.

**Invoicing.** This organization has an effective and proven procedure to control the billing to the PRDE and payments to subcontracted providers. For each project or school, we will create a control order in our accounting system; this control order will also be assigned to each of the invoices related to the specific project as well as eligible cost invoices. These controls allow control standards to analyze each project individually and monitor the proper management of the assigned budget. To bill the services provided to the PRDE, we will take attendance during the services provided to each of the teachers or students to be impacted as part of the record of delivered materials, if any. We will keep a digital and print copy of each of the attendance lists as well as of the certificates, tests, evaluations, and other materials. Our Finance Department receives all documentation and verifies that the evidence matches the requirements of the PRDE. Once everything is documented, we will proceed to prepare an invoice. We keep digital files of all the documentation. Finally, we will send the PRDE a print original document and two digital copies (pen drive or CD) and keep a print copy and a digital copy of all the documentation for at least five years.

**Fiscal and financial status.** Our audited financial statement (TAB 19) evidences that we are a company with solid finances and in constant growth, which has *assets to operate independently and without the need for external financing*. According to our audited financial statement, our net worth exceeds five million dollars: (Current assets \$9,474,555 - Current liabilities \$2,039,301 = Net worth of \$7,435,254). Moreover, we have a line of credit that can be extended to cover the expenses of this project. We are leaders in children's literature in Puerto Rico and in the pre-university educational market, and we have approximately **60 highly qualified employees and over 200 external collaborators** committed with our *educational services project and professional development offer*.

**Summary.** We are a prestigious organization with a good track record and educational roots as well as considerable **intellectual, academic, and financial assets and a tested capacity** to offer these services. We comply with Puerto Rico's educational public policies, and our resources are available to PRDE with the certainty that we **can generate successful and cost-efficient results** that will benefit public schools in *offering the professional development services in the areas of technology use and management, technology integration, curriculum integration, and instruction*.

**TAB 4**

**Sample Price Sheet**

**TAB 4: PROPOSAL SUBMITAL FORM 2 – SAMPLE PRICE PROPOSAL FORM**

**CATEGORY 2: PROFESSIONAL DEVELOPMENT CURRICULUM INTEGRATION AND TECHNICAL TRAINING**

**PART A: LAPTOPS**

<b>ITEM</b>	<b>MODEL</b>	<b>QTY</b>	<b>PRICE</b>	<b>SUB-TOTAL</b>	<b>TOTAL</b>
LAPTOP – USE	1. Workshops	25	\$170.00 per participant	\$5,100 per group of 30 participants	\$125,700 per 25 workshops
	2. Coaching	50	\$525.00	\$26,250	\$26,250
INTEGRATION INTO CLASSROOM AND CURRICULUM	3. Demonstration classes/Webinar	25	\$360.00	\$9,000	\$9,000
	4. Mentoring	50	\$660.00	\$33,000	\$33,000
TECHNICAL TRAINING FOR OSIATD, FIEL TECHNICIANS	5. Seminars or Conferences	25	\$161.29 per participant	\$5,000 per group of 31 participants	\$125,000 per 25 seminars
	6. Workshops	25	\$170.00 per participant	\$5,100 per group of 30 participants	\$125,700 per 25 workshops
TOTAL (MUST INCLUDE PRICING FOR ALL LINE ITEMS)	<b>6 Models</b>	200			<b>** \$444,650</b>

\*\*Conditioned to the amount of services approved per modality.

**PART B: TABLETS**

<b>ITEM</b>	<b>MODEL</b>	<b>QTY</b>	<b>PRICE</b>		
LAPTOP – USE	7. Workshops	25	\$170.00 per participant	\$5,100 per group of 30 participants	\$125,700 per 25 workshops
	8. Coaching	50	\$525.00	\$26,250	\$26,250
INTEGRATION INTO CLASSROOM AND CURRICULUM	9. Demonstration classes/Webinar	25	\$360.00	\$9,000	\$9,000
	10. Mentoring	50	\$660.00	\$33,000	\$33,000
TECHNICAL TRAINING FOR OSIATD, FIEL TECHNICIANS	11. Seminars or Conferences	25	\$161.29 per participant	\$5,000 per group of 31 participants	\$125,000 per 25 seminars
	12. Workshops	25	\$170.00 per participant	\$5,100 per group of 30 participants	\$125,700 per 25 workshops
TOTAL (MUST INCLUDE PRICING FOR ALL LINE ITEMS)	<b>6 Models</b>	200			<b>** \$444,650</b>

\*\*Conditioned to the amount of services approved per modality.

**TAB 5**

**Non-Collusion Affidavit – *Mandatory***

PROPOSAL SUBMITTAL FORM 3 - NON-COLLUSION AFFIDAVIT

EACH PROPOSER IS REQUIRED TO SUBMIT A NON-COLLUSION AFFIDAVIT WITH ITS PROPOSAL. ANY PROPOSER THAT FAILS TO SUBMIT A NON-COLLUSION AFFIDAVIT SHALL BE AUTOMATICALLY DISQUALIFIED FROM CONSIDERATION FOR AN AWARD.

I, the undersigned, am the Finance and Operations Director of SM, Inc. (the

"Proposer"), and being duly sworn, declare that the proposal submitted by the Proposer in response to PRDE-OSIATD-FY2018-002-Mobile Devices, Professional Development and Project Management is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the proposer has not directly or indirectly induced or solicited any other proposer to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any proposer or anyone else to put in a sham proposal; that the proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the proposer or any other proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other proposer, or to secure any advantage against the government of the Commonwealth of Puerto Rico or the Puerto Rico Department of Education; that all statements contained in the proposal are true; and, further, that the Proposer has not, directly or indirectly, submitted its proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I certify (or declare) under penalty of perjury under the laws of the Commonwealth of Puerto Rico that the foregoing is true and correct.

Affidavit 380

NAME OF PROPOSER: SM, Inc.
Signature: [Handwritten Signature]
Name: Sheilla Vázquez Beniquez
Title: Finance and Operations Director
Date: October 3, 2018

Of legal age, married, employed and resident of Puerto, Puerto Rico.

NOTARY PUBLIC SEAL

Sworn to and subscribed before me on this 3 day of October 2018, proved to me on the basis of satisfactory evidence to be the person who appeared before me and signed this Affidavit.



[Handwritten Signature]
Public Notary

## DECLARACIÓN JURADA

Yo, Sheilla Vázquez Benítez, mayor de edad, casada, empleada, y vecino (a) de Dorado, Puerto Rico, bajo juramento declare lo siguiente:

1. Que mi nombre y demás circunstancias personales son las antes expresadas.
2. Que reconozco que por virtud de la Ley Núm. 2-2018, conocida como el “Código Anticorrupción para un Nuevo Puerto Rico”, se dispone la prohibición de que ninguna entidad gubernamental adjudique una subasta u otorgue contrato alguno para la realización de servicios o entrega de bienes a personas natural o jurídica o cualquier presidente, vicepresidente, director, director ejecutivo o miembro de una junta de oficiales o junta de directores, o personas que desempeñen funciones equivalente para la persona jurídica, que haya sido convicta o se haya declarado culpable en la jurisdicción de Puerto Rico, en la jurisdicción federal o en cualquiera de los estados de los Estados Unidos de América de cualquiera de los siguientes delitos:
  - a. Infracción a los incisos del Artículo 4.2 de la Ley Núm. 1-2012, según enmendada, conocida como la “Ley Orgánica de la Oficina de Ética Gubernamental”, tipificados en el Artículo 4.7 de dicha ley;
  - b. Infracción a los incisos del Artículo 4.3 de la Ley Núm. 1-2012, según enmendada conocida como la “Ley Orgánica de la Oficina de Ética Gubernamental”, tipificados en el Artículo 4.7 de dicha ley;
  - c. Infracción al Artículo 5.4 de la Ley Núm. 1-2012, según enmendada, conocida como la “Ley Orgánica de la Oficina de Ética Gubernamental”, tipificado en el Artículo 5.7 de dicha ley;
  - d. Enriquecimiento ilícito;
  - e. Enriquecimiento injustificado;
  - f. Aprovechamiento ilícito de trabajos o servicios públicos;
  - g. Negociación incompatible con el ejercicio del cargo público;
  - h. Intervención indebida en las operaciones gubernamentales;
  - i. Retención de propiedad;
  - j. Alteración o mutilación de propiedad;
  - k. Certificaciones falsas;
  - l. Soborno;
  - m. Oferta de Soborno;
  - n. Influencia indebida;
  - o. Malversación de fondos públicos;
  - p. Posesión y uso ilegal de información, recibos y comprobantes de pago de contribuciones;
  - q. Compra y venta ilegal de bienes en pago de contribuciones;
  - r. Infracción a los incisos (f), (g), (k), (l), (o) y (p) del Artículo 3.2 del Código Anticorrupción para un Nuevo Puerto Rico;
  - s. Cualquier delito grave que involucre el mal uso de fondos o propiedad pública;
  - t. Apropiación ilegal agravada;

- u. Extorsión;
- v. Sabotaje de servicios públicos esenciales;
- w. Falsificación de documentos;
- x. Fraude;
- y. Fraude por medio informático;
- z. Fraude en las construcciones;
- aa. Uso, posesión o traspaso fraudulento de tarjetas con bandas electrónicas;
- bb. Intervención indebida en las operaciones gubernamentales;
- cc. Negociación incompatible con el ejercicio del cargo público;
- dd. Aprovechamiento ilícito de trabajos o servicios públicos;
- ee. Lavado de dinero;
- ff. Daño agravado;
- gg. Alteración o mutilación de propiedad;
- hh. Archivo de documentos o datos falsos;
- II. Posesión y uso ilegal de información, recibos y comprobantes de pago de contribuciones;
- jj. Presentación de escritos falsos;
- kk. Posesión ilegal de recibos de contribuciones;
- II. Falsificación de asientos en registros;
- mm. Falsificación de sellos;
- nn. Falsedad ideológica;
- oo. Falsificación de licencia, certificado y otra documentación;
- pp. Falsificación en el ejercicio de profesiones u ocupaciones;
- qq. Posesión de instrumentos para falsificación;
- n-. Omisión en el cumplimiento del deber;
- ss. Venta ilegal de bienes;
- tt. Incumplimiento del deber;
- uu. Negligencia en el cumplimiento del deber;
- vv. Usurpación de cargo público;
- ww. Impedir la inspección de libros y documentos.

3. Que suscribo esta Declaración Jurada de conformidad con lo establecido en el Código Anticorrupción para un Nuevo Puerto Rico.

4. Que entiendo y acepto que la convicción o declaración de culpabilidad por cualquier de los delitos enumerados en el párrafo 2 de esta Declaración Jurada conlleva, además de cualquier penalidad, la resolución automática de todos los contratos entre el suscribiente, la compañía o negocio que represento y cualquier entidad gubernamental, corporación pública, municipio, la Rama Legislativa o la Rama Judicial.

5. Que juro y suscribo la presente Declaración Jurada sin el ánimo de defraudar, sino con el propósito de que las autoridades pertinentes tomen conocimiento de los hechos antes consignados.

6. Que hago la presente Declaración Jurada para que cualquier entidad gubernamental, corporación pública, municipio, la Rama Legislativa o la Rama Judicial, tenga conocimiento de lo aquí declarado y para cualquier otro propósito administrativo y/o legal.

Y PARA QUE ASE CONSTE, juro y firmo la presente declaración en Dorado,  
Puerto Rico a 3 de octubre de 2018.

  
DECLARANTE

Affidávit Número: 379

Jurada y suscrita ante mí por Sheilla Vázquez Benítez, de las circunstancias indicadas, a quien doy fe de conocer mediante conocimiento personal, en Dorado,  
Puerto Rico, a 3 de octubre de 2018.



  
NOTARIO PÚBLICO  
Berenice A. Iriazary Torres

**TAB 6**

**Proposal Bid Bond (15%) - *Mandatory***



United Surety & Indemnity Co.  
PO Box 2111  
San Juan, PR 00922-2111  
t. 787.273.1818  
f. 787.625.0893 • 787.783.8115  
www.usicgroup.com

**BID BOND**

**BOND NO. 18194388-2**

**KNOW ALL MEN BY THESE PRESENTS**, that we **EDICIONES SM, INC.** as Principal, and the **UNITED SURETY & INDEMNITY COMPANY**, an insurance company duly organized and existing under the laws of the Commonwealth of Puerto Rico, having its principal place of business at Guaynabo, Puerto Rico, as surety, are held and firmly bound unto **DEPARTAMENTO DE EDUCACION** as Obligee, in the penal sum of **FIFTEEN PERCENT (15%) OF THE BID AMOUNT** dollars, lawful money of the United States of America, for the payment of which, well and truly to be made, we bind ourselves, our heirs executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

**WHEREAS**, the said Principal is herewith submitting a proposal **RFP NO. PRDE-OSIATD-FY2018-002 - MOBILE DEVICES, PROFESSIONAL DEVELOPMENT AND PROJECT MANAGEMENT**.

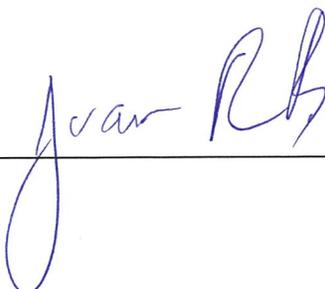
**THE CONDITION OF THE ABOVE OBLIGATIONS IS SUCH**, that if the aforesaid Principal is awarded the contract, the Principal shall, within the period specified therein, or if no period is specified, within ten (10) days after the notice of such award, enter into a contract and give bond for the faithful performance of the contract, then this obligation shall be null and void and of no effect; otherwise the Principal and the Surety will pay the Obligee the difference in money between the amount of the bid of the Principal and the amount for which the Obligee legally contract with a third party to perform the work if such amount is in excess of the amount of the bid of the Principal. In no event shall the liability hereunder exceed the penal sum hereof.

This bond is valid for 90 days from the date it is issued or the term specified in the Bid documents whichever is less.

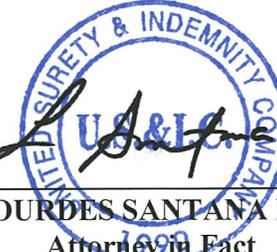
Any suits or proceedings in equity brought or to be brought against the Surety shall be initiated within ninety (90) days after the acceptance of the Principal's bid.

**SIGNED and SEALED** this October 4, 2018.

**EDICIONES SM, INC.**

By:   
\_\_\_\_\_

**UNITED SURETY & INDEMNITY COMPANY**

By:   
  
\_\_\_\_\_ **LOURDES SANTANA LOPEZ**  
Attorney in Fact



# UNITED SURETY & INDEMNITY COMPANY

A Commitment to Excellence and Integrity

## CERTIFICATE OF APPOINTMENT OF ATTORNEY-IN-FACT

Know All Men by these Presents, that UNITED SURETY & INDEMNITY COMPANY, a corporation duly organized and existing under the laws of the Commonwealth of Puerto Rico, and having its principal office in the City of Guaynabo, Puerto Rico, does hereby certify that it has made, constituted and appointed LOURDES SANTANA LOPEZ, of Bayamón, Puerto Rico, its true and lawful Attorney-in-Fact with full power and authority conferred to sign, seal and execute in its behalf bonds, undertakings and other obligatory instruments of similar nature as follows:

### WITHOUT LIMITATION

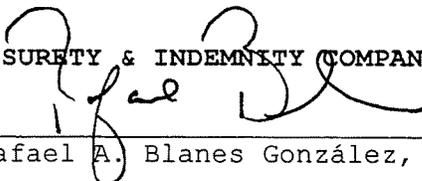
and to bind UNITED SURETY & INDEMNITY COMPANY thereby as fully and to the same extent as if such instruments were signed by an officer of UNITED SURETY & INDEMNITY COMPANY and all the acts of said Attorney, pursuant to the authority given by virtue of Deed Number Eighteen (18), executed on the 10<sup>th</sup> of October, 2008; before Notary Public Johanny Martínez Batista, are hereby ratified and confirmed.

The Power of Attorney granted by the above mentioned deed, was made and executed pursuant to and by authority of the By-Laws duly adopted by the Stockholders of the Company. Certified copy of the above mentioned Deed shall be filed at the Office of the Commissioner of Insurance of Puerto Rico.

In Witness Whereof, UNITED SURETY & INDEMNITY COMPANY has, pursuant to its By-Laws, caused the present certificate to be signed by the Secretary and its corporate seal to be hereto affixed this 31<sup>st</sup> of March, 2011.

UNITED SURETY & INDEMNITY COMPANY

By:

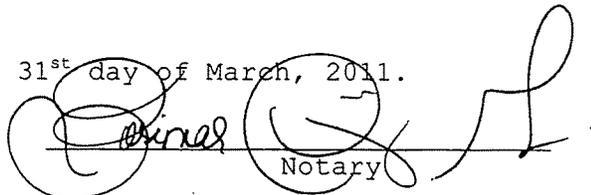
  
Rafael A. Blanes González, Secretary



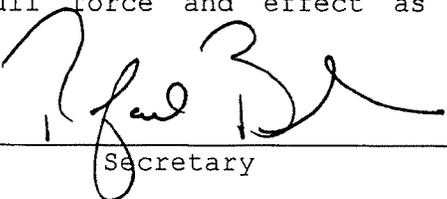
Affidavit Number: 0185

and subscribed before me by Rafael A. Blanes González, of legal age, married, executive and resident of Guaynabo, Puerto Rico, to me personally known.

In Guaynabo, Puerto Rico, this 31<sup>st</sup> day of March, 2011.

  
Notary

The present certificate is in full force and effect as of this 4TH day of OCTOBER, 2018.

  
Secretary

**MANDATORY PREMIUM AND COVERAGE CONDITIONS RIDER-PUERTO RICO**

It is hereby understood and agreed that pursuant to the regulations approved by the Commissioner of Insurance of Puerto Rico, this bond is amended according to the following conditions and stipulations:

1. **Bond Premium Paid in Full by You:** If the premium for this bond is to be paid by you in its entirety, surety coverage will be afforded only if the total premium is paid in full to, and received by, us or our authorized representative on or before the effective date shown in the bond. Otherwise, the bond will be effective on the date the total premium is paid in full to, and received by, us or our authorized representative, and we will proceed as indicated on Section 4 of this rider.
2. **Rider Premium:** Riders issued after the inception date of this bond, affording additional coverage and which result in an additional premium, shall not be effective until the total additional premium due thereon is paid in full to, and received by, us or our authorized representation.
3. **Premium Corrections:** Any additional premium due resulting from changes in rates, classifications, premium bases, or any other adjustments (as determined by us or the proper rating organization), shall be paid full within thirty (30) days from the date of billing of the corrective rider.
4. **Late Payments:** If payment is received after the specified due date, we will proceed as follows:
  - a. For new bonds (Section 1 above) we will issue a Change of Effective Date of Coverage Notice stating:
    - (1) that the coverage afforded under the bond is effective as of the date of receipt of the applicable premium payment,
    - (2) the resulting amended inception and expiration dates of the bond, which will be postponed by the same number of days that coverage was not afforded due to the late receipt of the premium payment, and
    - (3) the corresponding period of time during which coverage is not afforded under the bond.
  - b. For premium corrections riders (Section 8 above) we will issue, subject to the applicable regulations, a limited Reinstatement Notice stating:
    - (1) that the coverage afforded by the bond will be reinstated as of the date of receipt of the applicable additional premium payment,
    - (2) the period for which coverage is not afforded, and
    - (3) the amount of premium return due to you, if any.
5. **Cancellation of Bond:** With reference to renewal of bonds, such bonds will not be effective if the corresponding premium has not been received by us or our authorized representative on the date established in the Cancellation Notice, which will be issued in compliance with the terms of the bond.
6. **Definition of Authorized Representative:** Authorized representative for the purpose of this rider means a General Agent, an Attorney in Fact, or a person duly authorized in writing by us for premium collection purposes.
7. This mandatory rider supersedes any other conditions to this effect in the bond to which it is attached.

**TAB 7**

**Proposer Questionnaire**

**PROPOSAL SUBMITTAL FORM 4 - PROPOSER QUESTIONNAIRE**

**ANSWER ALL QUESTIONS THAT APPLY; IF A QUESTION DOES NOT APPLY, MARK N/A.**

Business Name: SM, Inc.

Telephone Number: 787-224-4944; Fax Number: 787-625-9799

E-mail Address: sheilla.vazquez@sm-pr.com. Web Site Address: www.sm-pr.com

Business Address: Barrio Palmas 776 calle 7 Ste 2

City: Cataño, PR 00962

**BUSINESS INFORMATION**

Years in Business: 14 years

Check the following as it applies to your Business:

Public Corporation       Privately Held Corporation       Limited Partnership

Sole Proprietorship       Limited Liability Company

Manufacturer       Distributor       Service Proposer

Are you a subsidiary of another Company:  Yes  No; If Yes, name of parent: \_\_\_\_\_

List all companies with whom you have partial or complete ownership: \_\_\_\_\_

Check the following Business Classifications that apply to your firm, if any:

Small Business Concern       Minority owned business       Woman owned business

Does your firm have EDI capabilities:  Yes  No

**OTHER OPERATIONAL INFORMATION**

Number hourly employees: Direct 2; Indirect 29

Number salary employees: Direct 42; Indirect 3

Normal work days: 5; Normal work hours: 40

Does your firm have a Quality Assurance Program?  Yes  No.

Do you provide on-site technical support?  Yes  No.

**TAB 8**

**Proposer References (3 Minimum)**

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**PROPOSAL SUBMITTAL FORM 5: PROPOSER REFERENCES (3 Required)**

Proposer is required to provide a minimum of three (3) customer references for similar scope and magnitude of work that Proposer has performed within the past three years. Please include only references for services that are similar enough to demonstrate Proposer's ability to perform the services requested in the above-referenced RFP.

---

**CLIENT REFERENCE NO. 1**

CLIENT NAME: ADDRESS: Asociación de Educación Privada: 150 PR-25 #1, San Juan 00901  
CONTACT NAME/TITLE: Dra. Ivette Náter Prieto: Executive Director  
CONTACT EMAIL: SERVICE DATES: iveaep@aeppr.org  
CONTACT PHONE: 787-722-6501  
SERVICE DATES: 2012 - 2018  
DESCRIPTION OF WORK PERFORMED /PERFORMING: Trainings and workshops offered to an approximate of three thousands teachers in educational and technology subjects  
CONTRACT AMOUNT (\$): Per services. Amount varies between 50k through 200k

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**CLIENT REFERENCE NO. 2**

CLIENT NAME: ADDRESS: Superintendencia de Escuelas Católicas: Los Maestros 789-B, Jaime Drew, San Juan PR 00923-2400  
CONTACT NAME/TITLE: Ana Cortés: Superintendent of Schools  
CONTACT EMAIL: SERVICE DATES: acortes@secsj.net  
CONTACT PHONE: 787-731-6100  
SERVICE DATES: 2009 - present  
DESCRIPTION OF WORK PERFORMED /PERFORMING: Seminars and workshops os issues related to educational diversity and instructional strategies.  
CONTRACT AMOUNT (\$): Per services. Amount varies between 50k through 200k

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**CLIENT REFERENCE NO. 3**

CLIENT NAME: ADDRESS:	RAD School Project: Miguel de Cervantes Saavedra, Carr. 831 Km 9.4 Urb., Bayamón, 00956
CONTACT NAME/TITLE:	Christian De Jesús: School Principal
CONTACT EMAIL: SERVICE DATES:	cdjesus22@yahoo.com
CONTACT PHONE:	787-453-2683
SERVICE DATES:	2014 - 2017
DESCRIPTION OF WORK PERFORMED /PERFORMING:	Educational services offered in a support network of schools. Among the services offered, mention is made of: coaching, mentoring and workshops for the teachers and the school principal, as well as support in the ontegration of technology in the classroom.
CONTRACT AMOUNT (\$):	Near 5,000,000

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**CLIENT REFERENCE NO. 4**

CLIENT NAME: ADDRESS:	_____
CONTACT NAME/TITLE:	_____
CONTACT EMAIL: SERVICE DATES:	_____
CONTACT PHONE:	_____
SERVICE DATES:	_____
DESCRIPTION OF WORK PERFORMED /PERFORMING:	_____ _____ _____
CONTRACT AMOUNT (\$):	_____ _____

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**TAB 9**

**Designation of Subcontractors**

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**PROPOSAL SUBMITTAL FORM 6: DESIGNATION OF SUBCONTRACTORS**

**PROPOSER NAME:**

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**SUBCONTRACTOR NO. 1:**

Proposed Subcontractor Services: N/A

Percentage (%) of Total Work: \_\_\_\_\_

Subcontractor Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person/Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

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**SUBCONTRACTOR NO. 2:**

Proposed Subcontractor Services: N/A

Percentage (%) of Total Work: \_\_\_\_\_

Subcontractor Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Contact Person/Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

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**SUBCONTRACTOR NO. 3**

Proposed Subcontractor Services: N/A

Percentage (%) of Total Work: \_\_\_\_\_

Subcontractor Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person/Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

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**ADD ADDITIONAL PAGES IF NEEDED**

**TAB 10**

**Certificate of Insurance Coverage**

**PROPOSAL SUBMITTAL FORM 7: CERTIFICATE OF INSURANCE COVERAGE**

**PROOF THAT COVERAGE IS EITHER CURRENTLY IN PLACE OR WILL BE PROVIDED MUST BE SUBMITTED WITH THE PROPOSER PROPOSAL IN ONE (1) OF THE TWO (2) METHODS DESCRIBED BELOW.**

**PROPOSER NAME:** SM, Inc. \_\_\_\_\_

**PROPOSER ADDRESS:** Barrio Palmas 776 calle 7 Ste. 2 Cataño, PR 00962 \_\_\_\_\_

**NAME OF SURETY:** INTEGRAND Assurance Company \_\_\_\_\_

**NAME OF AGENT:** Christiansen Insurance Inc. \_\_\_\_\_

**AGENT'S PHONE:** 787-224-4944 \_\_\_\_\_

The undersigned hereby certifies that SM, Inc. (the "Proposer") and its subcontractor(s) has the following insurance coverage, respectfully:

TYPE OF COVERAGE	MINIMUM LIMITS	POLICY OR BINDER NO.	ACTUAL LIMITS PROVIDED	EXPIRATION DATE
COMMERCIAL/GENERAL LIABILITY OCC	\$1,000,000			
COMMERCIAL/GENERAL LIABILITY AGG	\$2,000,000			
BUSINESS AUTOMOBILE LIABILITY	\$1,000,000 PER OCCURRENCE			
EMPLOYERS' LIABILITY	\$500,000 PER OCCURRENCE			
WORKER'S COMP	PUERTO RICO MINIMUM COMPENSATION STATUTORY			
TECHNOLOGY ERRORS AND OMISSIONS	\$2,000,000			
TECHNOLOGY ERRORS AND OMISSIONS (SUBCONTRACTOR)	\$1,000,000			

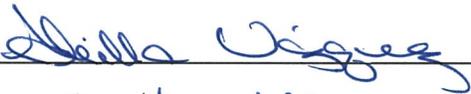
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**PROOF THAT COVERAGE IS EITHER CURRENTLY IN PLACE OR WILL BE PROVIDED MUST BE SUBMITTED WITH THE PROPOSER PROPOSAL.** This can be done by one of the two following methods:

1. Complete form "CERTIFICATION OF INSURANCE COVERAGE" *or*
2. Submit a Certificate of Insurance on a form provided by your Insurance Agent. This form must include the following clauses:
  - (a) The Puerto Rico Department of Education is hereby named as Additional Insured.
  - (b) The policy(s) cannot be reduced or canceled without at least forty-five (45) days' prior written notice to the Puerto Rico Department of Education.
  - (c) The insurance company is prohibited from pleading government function in the absence of any specified written authority from the Puerto Rico Department of Education.
  - (d) The policy(s) will automatically include and cover all phases of work, equipment, persons, et cetera which are normally covered while performing work under the above contract, whether specifically written therein or not.

Regardless of the method used, the form MUST be totally complete, MUST show that all Limits of Insurance are or will be met, and MUST be signed by the Agent.

The successful Proposer will be required to provide insurance coverage as shown in General Conditions of RFP and Contract, prior to providing any services. This insurance coverage must be maintained throughout the term of the contract.

Signature:   
Name: Sheila Vazquez  
Title: Finance and Operations Director  
Date: 10/4/18

**PRODUCER**  
CHRISTIANSEN INSURANCE INC  
METRO BRANCH

**FILE:** 97422647

**INSURED**  
EDICIONES SM INC.  
SEE EXTENDED NAMED INSURED  
PO BOX 50091  
  
TOA BAJA PR, 00950-0091

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.**

**INSURERS AFFORDING COVERAGE**

INSURER A: INTEGRAND Assurance Company  
INSURER B:  
INSURER C:  
INSURER D:  
INSURER E: DSM

**COVERAGES**

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

INS LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS	
A	<b>COMMERCIAL GENERAL LIABILITY</b>  CLAIMS MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC	CP-28109030	2/10/2018	2/10/2019	EACH OCCURRENCE:	\$ 1,000,000.00
					DAMAGE TO RENTED PREMISES (ea occurrence)	\$ 500,000.00
					MED EXP (Any one person)	\$ 10,000.00
					PERSONAL & ADV INJURY	\$ 1,000,000.00
					GENERAL AGGREGATE	\$ 2,000,000.00
					PRODUCTS - COMP/OP AGG	\$ INCLUDED
A	<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTOS <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS <input type="checkbox"/> PRIVATE AUTO	AP-28109131	2/10/2018	2/10/2019	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000.00
					BODILY INJURY (Per person)	\$
					BODILY INJURY (Per accident)	\$
					PROPERTY DAMAGE (Per accident)	\$
	<b>GARAGE LIABILITY</b> <input type="checkbox"/> ANY AUTOS				AUTO ONLY - EA ACCIDENT	\$
					OTHER THAN AUTO ONLY: EA ACC	\$
					AGG	\$
	<b>EXCESS / UMBRELLA LIABILITY</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE  <input type="checkbox"/> DEDUCTIBLE <input type="checkbox"/> RETENTION \$				EACH OCCURRENCE	\$
					AGGREGATE	\$
A	<b>WORKERS COMPENSATION AND EMPLOYER'S LIABILITY</b> <input checked="" type="checkbox"/> STOP GAP	CP-28109030	2/10/2018	2/10/2019	WC STATUTORY LIMITS	OTHER <input checked="" type="checkbox"/>
					E.L. EACH ACCIDENT	\$ 1,000,000.00
					E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000.00
					E.L. - DISEASE - POLICY LIMIT	\$ 1,000,000.00
	<b>OTHER</b>					

**DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS ADDED BY ENDORSEMENT /SPECIAL PROVISIONS WITH RESPECT TO INSURED OPERATIONS:**

The cancellation provision provided on this Certificate of Insurance will not apply if cancellation is for non-payment of premium.

<b>CERTIFICATE HOLDER</b> <input checked="" type="checkbox"/>	<b>ADDITIONAL INSURED; INSURER LETTER:</b>	<b>CANCELLATION</b>
PUERTO RICO DEPARTMENT OF EDUCATION CORRECTIONS BUILDING, 4TH FLOOR TTE. CESAR GONZALEZ ESQUINA KALAF URB. INDUSTRIAL TRES MONJITAS HATO REY, PR 00926	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 60 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.	AUTHORIZED REPRESENTATIVE 

Additional Insured

It is understood and agreed that:

PUERTO RICO DEPARTMENT OF EDUCATION  
CORRECTIONS BUILDING, 4TH FLOOR  
TTE. CESAR GONZALEZ ESQUINA KALAF  
URB. INDUSTRIAL TRES MONJITAS  
HATO REY, PR 00926

is included as additional insured but only with respect to the following :

WITH RESPECT TO INSURED OPERATIONS:



Agent: CHRISTIANSEN INSURANCE INC

Producer: CHRISTIANSEN INSURANCE INC

Policy: CP-28109030 AP-28109131 CP-28109030 STOP GAP

Insured: EDICIONES SM INC. SEE EXTENDED NAMED INSURED

File: 97422647

## HOLD HARMLESS AGREEMENT

Issued to: PUERTO RICO DEPARTMENT OF EDUCATION  
CORRECTIONS BUILDING, 4TH FLOOR  
TTE. CESAR GONZALEZ ESQUINA KALAF  
URB. INDUSTRIAL TRES MONJITAS  
HATO REY, PR 00926

The contractor, for itself, agents, employees, successor and assigns agrees to safe and hold harmless the owner from and against any and all claims, demands and/or suits whether judicial or extrajudicial for any cause whatsoever arising out or related to the execution of the contract described below, and its insurers shall defend the owner from such claims, demands and / or suits and shall bear all the expenses for such defense contemplated within the coverages and limits provided by this policy, except where such claims, demands and/or suits are due solely to the negligence of:

PUERTO RICO DEPARTMENT OF EDUCATION  
CORRECTIONS BUILDING, 4TH FLOOR  
TTE. CESAR GONZALEZ ESQUINA KALAF  
URB. INDUSTRIAL TRES MONJITAS  
HATO REY, PR 00926

---

( Owner )

Its officers, agents and/or employees.

This Hold Harmless Agreement does not extend, modify, increase limits of, or otherwise alter the coverage provided by this policy.

WITH RESPECT TO INSURED OPERATIONS:

Agent: CHRISTIANSEN INSURAN CE INC  
Producer: CHRISTIANSEN INSURAN CE INC  
Policy: CP-28109030 AP-28109131 CP-28109030 STOP GAP

Insured: EDICIONES SM INC. SEE EXTENDED NAMED INSURED  
File: 97422647

## SIXTY (60) DAYS CANCELLATION NOTICE

It is hereby understood and agreed that in the event of cancellation of this policy sixty (60) days written notice shall be given to:

PUERTO RICO DEPARTMENT OF EDUCATION  
CORRECTIONS BUILDING, 4TH FLOOR  
TTE. CESAR GONZALEZ ESQUINA KALAF  
URB. INDUSTRIAL TRES MONJITAS  
HATO REY, PR 00926

Prior said cancellation becomes in effect. This will apply only on cancellation requested by the company for other reasons than non-payment of premium, additional premiums due or installments due under any premium financing agreement. Under above circumstance only ten (10) days notification will be given, as per policy conditions.

WITH RESPECT TO INSURED OPERATIONS:

INTEGRAND  
ASSURANCE COMPANY

Agent: CHRISTIANSEN INSURAN CE INC  
Producer: CHRISTIANSEN INSURAN CE INC  
Policy: CP-28109030 AP-28109131 CP-28109030 STOP GAP

Insured: EDICIONES SM INC. SEE EXTENDED NAMED INSURED  
File: 97422647

**TAB 11**

**Copy of Filed Letter Of Intent**

**PROPOSAL SUBMITTAL FORM 8: LETTER OF INTENT TO SUBMIT A PROPOSAL**

PROPOSERS ARE REQUIRED TO SUBMIT A LETTER OF INTENT NO LATER THAN **4:00 P.M., SEPTEMBER 14, 2018**. FAILURE TO DELIVER A LETTER OF INTENT BY THE DEADLINE SHALL RESULT IN AUTOMATIC DISQUALIFICATION FROM PARTICIPATION IN THE COMPETITIVE PROCESS.

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SM,Inc ( the "Proposer") has received a copy of **RFP NO. PRDE-OSIATD-FY2018-002 Mobile Devices, Professional Development and Project Management** (the "RFP) issued by the Puerto Rico Department of Education on August 17, 2018 . I, the undersigned, in my capacity as Finance Director of the Proposer, am duly authorized to submit this Letter of Intent on behalf of Proposer, and to designate the following person to act on behalf of the Proposer as its principal contact in connection with the RFP.

**PRINCIPAL CONTACT:**

Name: Sheilla Vazquez  
Title: Directora de Finanzas  
Address: Bo. Palmas 776 Calle 7 Suite 2 Cataño P R00962  
  
Office Phone: 787-625-9800  
Cell Phone: 787-224-4944  
Email: Sheilla.vazquez@sm-pr.com

I hereby acknowledge receipt of the RFP and any addenda thereto, and certify that it is the intent of the Proposer to submit a proposal in response to the RFP.

Signature:   
Name/Title: Sheilla Vázquez // Directora de Finanzas  
Date: 13 de septiembre de 2018

---

**LETTERS OF INTENT ARE TO BE ADDRESSED AND EMAILED TO**

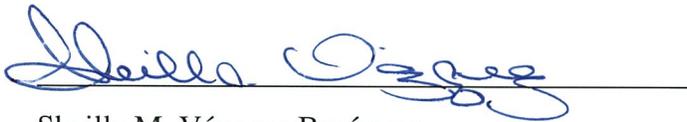
**Sr. José L. Narváez Figueroa**  
[osiatdproposal@de.pr.gov](mailto:osiatdproposal@de.pr.gov)

**TAB 12**

**Recent Legal Actions**

## TAB 12: DISCLOSURE OF RECENT LEGAL ACTIONS

The undersigned, after reasonable inquiry and investigation, has no knowledge of any action, suit, proceeding, or material claim or investigation pending or threatened against SM, Inc. in any court, or by or before any federal, state, municipal, or other governmental department, commission, board, bureau, agency, or instrumentality, domestic or foreign, or before any arbitrator of any kind, that, if adversely determined, would materially affect SM, Inc's ability, or the ability of its subcontractor(s), to perform the services described in its proposal at the prices set forth in its price proposal.



Sheilla M. Vázquez Benítez

Directora de Finanzas y Operaciones

SM, Inc.

**TAB 13**

**Service Level Agreement – *Mandatory***

TAB 13: Service Level Agreement

**Formación AulaTec** is a comprehensive initiative of professional development, curriculum integration, and technical training services focuses, in an integrated manner, on the day-to-day work educators carry out in their classrooms. This project offers a broad array of in-person services, complemented by information and communication technologies for a high-quality offering in the modalities authorized by the Department of Education, and requested services.

According to the proposed Professional development services in the proposal PRDE-OSIATD-2018-002 Mobile Devices, Professional Development and Project Management, the Service Level Agreement (“SLA”) is applicable in the Section B.4, the report. The proponent will be reporting Professional development statistics and findings on training progress and support categories requested by an provided to educators and administrative staff. We, the proposer, will be complying with the “SLA” that are established in the contract for the filing of reports and documents that are required according to the service.

The proponent undertakes to comply with the work plan and approved dates of service. The proposer will submit the necessary statistics to demonstrate the findings and achievements of the professional development interventions. The proposer will comply with the stipulations, reports and documents established in the contract, as applicable to the service to be offered.



Sheilla M. Vázquez Benítez  
Directora de Finanzas y Operaciones  
SM, Inc.

**TAB 14**

**Bidders Registry – Eligibility Certificate - *Mandatory***

**OFICINA DE ASUNTOS FEDERALES  
DOCUMENTOS REQUERIDOS PARA LA OTORGACIÓN DE CONTRATOS  
DE CORPORACIONES, SOCIEDADES Y/O INDIVIDUOS**

<b>CORPORACIONES</b>	<b>SOCIEDADES</b>	<b>INDIVIDUOS</b>
Copia del Certificado de Registro de Comerciante.	Copia del Certificado de Registro de Comerciante.	Copia del Certificado de Registro de Comerciante.
Certificación de "Good Standing" de la Corporación del Departamento de Estado	Contrato de Sociedad (debe indicar Socio que firmará contratos en representación de la Sociedad)	Certificación de la Administración para el Sustento de Menores (ASUME)
Certificación de Radicación de Planillas de Impuesto sobre Venta y Uso (Modelo SC 2942) Solo Agentes Retenedores	Certificación de Radicación de Planillas de Impuesto sobre Venta y Uso (Modelo SC 2942) Solo Agentes Retenedores	Certificación de Radicación de Planillas de Impuesto sobre Venta y Uso (Modelo SC 2942) Solo Agentes Retenedores
Certificación de Deuda de Impuesto sobre Venta y Uso (Modelo SC 2927)	Certificación de deuda de Impuesto sobre Venta y Uso (Modelo SC 2927)	Certificación de deuda de Impuesto sobre Venta y Uso (Modelo SC 2927)
Certificación de Existencia o Autorización para Hacer Negocios en PR de la Corporación del Departamento de Estado	Certificación de Haber Rendido Planillas sobre Ingreso Últimos Cinco (5) Años del Departamento de Hacienda	Certificación de Antecedentes Penales
Certificación de Deuda Contributiva del Departamento de Hacienda	Certificación de Deuda Contributiva del Departamento de Hacienda	Certificación de Deuda Contributiva del Departamento de Hacienda
Certificación de Haber Rendido Planillas sobre Ingreso Últimos Cinco (5) Años del Departamento de Hacienda	Certificación de Relevó de Retención del Departamento de Hacienda (Vence el 31 de diciembre de cada año)	Certificación de Haber Rendido Planillas sobre Ingreso Últimos Cinco (5) Años del Departamento de Hacienda
Certificación de Relevó de Retención del Departamento de Hacienda (Vence el 31 de diciembre de cada año)	Certificación de Radicación de Planillas de Propiedad Mueble del Centro de Recaudación de Ingresos Municipales (C.R.I.M.)	Certificación de Relevó de Retención del Departamento de Hacienda (Vence el 31 de diciembre de cada año)
Certificación de Deuda por Todos los Conceptos del Centro de Recaudación de Ingresos Municipales (C.R.I.M.) - aplica si posee propiedad mueble y/o inmueble.	Certificación de Deuda por Todos los Conceptos del Centro de Recaudación de Ingresos Municipales (C.R.I.M.) - aplica si posee propiedad mueble y/o inmueble.	Certificación de Deuda por Todos los Conceptos del Centro de Recaudación de Ingresos Municipales (C.R.I.M.) - aplica si posee propiedad mueble y/o inmueble.
Certificación de Radicación de Planillas de Propiedad Mueble del Centro de Recaudación de Ingresos Municipales (C.R.I.M.)	Declaración Jurada en los casos que no posea propiedad mueble o no radique planilla propiedad mueble (CRIM)	Certificación de Radicación de Planillas de Propiedad Mueble del Centro de Recaudación de Ingresos Municipales (C.R.I.M.)
Declaración Jurada en los casos que no posea propiedad mueble o no radique planilla propiedad mueble (CRIM)	Certificación de la Administración para el Sustento de Menores (ASUME) de todos los Socios	Declaración Jurada en los casos que no posea propiedad mueble o no radique planilla propiedad mueble (CRIM)
Resolución Corporativa Certificando Persona Autorizada a Firmar. Emitido por Junta Directores, en Documento con Membrete y Sello Corporativo	Certificación Deuda Dept. del Trabajo y Rec. Humanos -Seguro por Desempleo, Incapacidad Temporal	Certificación Deuda Dept. del Trabajo y Rec. Humanos -Seguro Por Desempleo, Incapacidad Temporal
Certificación Deuda Dept. del Trabajo y Rec. Hum. -Seguro por Desempleo, Incapacidad Temporal	Certificación Deuda Dept. del Trabajo y Rec. Humanos por Seguro Choferil	Certificación Deuda Dept. del Trabajo y Rec. Humanos por Seguro Choferil
Certificación Deuda Dept. del Trabajo y Rec. Humanos por Seguro Choferil	Declaración Jurada sobre acciones penales (En formato OAF)	Resumé Profesional (Actualizado) (Curriculum Vitae)
Certificación Deuda Fondo Seguro del Estado	Certificación de Antecedentes Penales	Certificación deuda Fondo Seguro Estado
Certificación de estado de cumplimiento de la Adm. para el Sustento de Menores (ASUME)	Póliza de Seguro (Si Aplica)	Declaración Jurada sobre acciones penales (En formato OAF)
Seguro Social Patronal	Seguro Social Patronal	Copia Licencia Profesional (Si Aplica)
Póliza de Seguro (Si Aplica)	Certificación de deuda del Fondo del Seguro del Estado	Copias (2) Identificaciones (Licencia)
Declaración Jurada sobre acciones penales (En formato OAF)		
Perfil Corporativo	Perfil de la Sociedad	
<b>CORPORACIONES FORANEAS</b>		
Certificación de Autorización para Hacer Negocios en PR del Departamento de Estado.		
Si no está haciendo negocios en PR y no tiene oficinas a nivel local, proveerá copia de sus artículos de incorporación o creación junto con un certificado de existencia de su lugar de incorporación.		
Declaración Jurada debidamente autenticada en la que conste el número de seguro social patronal, de tenerlo, que no tiene responsabilidad contributiva con el Estado Libre Asociado de PR y que el cumplimiento con los términos del contrato no resultan en que se convierta en una entidad haciendo negocios en PR.		
Certificación de estado de cumplimiento de la Adm. para el Sustento de Menores (ASUME)		
Resolución Corporativa Certificando Persona Autorizada a Firmar, emitida por la Junta De Directores, en documento con membrete corporativo		
Declaración Jurada sobre acciones penales (En formato OAF)		
Se incluirá en el contrato cláusula de retención en el origen del 29% (en casos de individuos en E.E.U.U. es 20%)		
<b>CORPORACIONES PÚBLICAS U ORGANISMOS GUBERNAMENTALES</b>		
Certificación de Persona Autorizada a Firmar.		
<b>CORPORACIONES registradas en ASG</b>		
✓ Certificado de ASG.		
✓ Copia del Certificado de Registro de Comerciante		
✓ Certificación de "Good Standing" de la Corporación del Departamento de Estado		
✓ Certificación de estado de cumplimiento de la Adm. para el Sustento de Menores (ASUME)		
✓ Resolución Corporativa Certificando Persona Autorizada a Firmar, Emitido por Junta Directores, en Documento con Membrete y Sello Corporativo		
✓ Certificación de Relevó de Retención del Departamento de Hacienda (Vence el 31 de diciembre de cada año)		
✓ Certificación de Deuda del IVU del Departamento de Hacienda		
✓ Certificación de radicación de Planillas del IVU del Departamento de Hacienda – Solo Agentes Retenedores		
✓ Declaración Jurada sobre acciones penales (En formato OAF)		

**NOTA: TODAS LAS CERTIFICACIONES PUEDEN SER COPIA (PREVIA PRESENTACIÓN DE LOS ORIGINALES) Y CON FECHA DE HABER SIDO EXPEDIDAS CON NO MAS DE SESENTA (60) DÍAS DE ANTELACIÓN A LA FECHA DE CONTRATACIÓN. No se aceptarán certificaciones vencidas o cuya emisión haya sido con más de sesenta (60) días de antelación a la fecha de contratación.** Para agilizar el proceso de contratación se recomienda envíen los documentos a la Oficina de Asuntos Federales por Fax y luego por correo. El número de Fax es el **787-463-2200**. **Todo proveedor que otorgue contrato por primera vez con el DE deberá completar la forma SC730 (Registro de suplidores)**  
**Feb. 2016 - Conforme a CC 1300-16-16 Hacienda.**



# Estado Libre Asociado de Puerto Rico

Administración de Servicios Generales  
Registro Único de Licitadores

## CERTIFICADO DE ELEGIBILIDAD

Fecha de Expedición  
**19-Abril-2018**

Número de Certificado  
**201800775**

Fecha de Vencimiento  
**19-Abril-2019**

Nombre del Licitador: **EDICIONES SM, INC.**

Seguro Social: **660644462**

Número de Licitador: **8077**

Dirección Postal: **P. O. BOX 50091 , TOA BAJA PR, 00950-0091**

Teléfono: **7876259800 / 7872244944**

Fax: **7876259799**

Email: **sheilla.vazquez@sm-pr.com**

Persona Autorizada a Firmar Oferta	Título que Ostenta
Juan Reyes Pérez	Director General
Sheilla Vazquez Beniquez	Directora de Finanzas

La vigencia de la elegibilidad está sujeta a que en 19-October-2018 el licitador evidencie su cumplimiento con el inciso E del Artículo 24 Plan de Reorganización Núm. 3 del 21 de noviembre de 2011 presentando la Declaración Jurada requerida por ley. Será responsabilidad de cada Agencia Ejecutiva, Corporación Pública o Municipio validar la elegibilidad del licitador antes de adjudicar cualquier procedimiento de adquisición, órdenes de compra u otorgar contratos.

ADVERTENCIA: Cualquier alteración anula este certificado y podría ser sancionado criminalmente conforme a las disposiciones aplicables del Código Penal de Puerto Rico. Para validar la información en este certificado, favor de acceder al portal <https://serviciosonline.gobierno.pr/validacionelectronica/> y usar el número de certificado como código de validación.





DEPARTAMENTO DE HACIENDA  
SECRETARÍA DE RENTAS INTERNAS  
NEGOCIADO DE SERVICIO AL CONTRIBUYENTE

Rev. 1 dic 2014



.....SNGLP 006

REL

EDICIONES SM INC  
PO BOX 50091  
TOA BAJA PR 00950-0091

Control: T18-00-000166

Núm. Cuenta: XXXXX4462

**CERTIFICADO DE RELEVO TOTAL DE LA RETENCIÓN EN EL ORIGEN SOBRE PAGOS POR SERVICIOS  
PRESTADOS POR CORPORACIONES Y SOCIEDADES**

De acuerdo a lo establecido en la Sección 1062.03(g) del Código de Rentas Internas de Puerto Rico del 2011, según enmendado y conforme a los requisitos establecidos en dicha sección, se le concede este Certificado de Relevo Total de Retención sobre Pagos por Servicios Prestados en Puerto Rico. Este relevo estará en vigor con respecto a los pagos efectuados durante el año natural 2018.

Deberá entregar copia de este certificado de relevo total a toda persona responsable de efectuar la retención sobre los pagos por servicios prestados.

Si las condiciones bajo las que se emite este certificado no aplican a su caso, favor de ignorar el mismo.

Para aclarar cualquier duda u obtener información sobre este particular, puede comunicarse al (787) 721-9090.

Este relevo no lo exime del pago de cualquier deuda contributiva.

Expedido el día 2 de enero de 2018.

Secretario Auxiliar  
Área de Rentas Internas

**Vence el 31 de diciembre del 2018**

PO BOX 9024140 SAN JUAN, PUERTO RICO 00902-4140



Gobierno de Puerto Rico  
DEPARTAMENTO DE HACIENDA  
Área de Rentas Internas

Certificación de Radicación de Planillas  
Impuesto Sobre Ventas y Uso

EDICIONES SM INC.  
PO BOX 50091  
TOA BAJA PR 00950-0091

Fecha: 02 octubre 2018  
ID de Contribuyente: 06548-23424  
ID de Correspondencia: L1349315072

Este Comerciante **ha cumplido** con la radicación de sus Planillas Mensuales de Impuesto sobre Ventas y Uso y/o Planilla Mensual de Impuesto sobre Importaciones.

ADVERTENCIA:

Esta Certificación refleja *únicamente* información con relación al Impuesto sobre Ventas y Uso. Para obtener esta Certificación de otros conceptos contributivos, acceda <https://colecturiavirtual.hacienda.pr.gov/portal> bajo el enlace de "Servicios" o puede visitar cualquiera de nuestras colectorías de Rentas Internas o cualquiera de nuestros Centros de Servicio al Contribuyente alrededor de la isla. Para detalles de estas localizaciones puede acceder a [www.hacienda.pr.gov](http://www.hacienda.pr.gov).

VALIDACIÓN

Para verificar si este Certificado es válido, vaya a <https://suri.hacienda.pr.gov> y presione el enlace de "Verificar Certificado". Este Certificado es válido hasta 30 días después de la fecha de emisión.



Gobierno de Puerto Rico  
DEPARTAMENTO DE HACIENDA  
Área de Rentas Internas

Certificación de Deuda  
Impuesto sobre Ventas y Uso

EDICIONES SM INC.  
PO BOX 50091  
TOA BAJA PR 00950-0091

Fecha: 02 octubre 2018  
ID de Contribuyente: 06548-23424  
ID de Correspondencia: L1573272064

Cuenta	Principal	Intereses	Recargos	Penalidades	Multas/Otros	Balance Adeudado
Ventas y Uso	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totales</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

Esta Certificación no incluye deudas en proceso de investigación.

ADVERTENCIA:

Esta Certificación refleja *únicamente* información con relación al Impuesto sobre Ventas y Uso. Para obtener esta Certificación de otros conceptos contributivos, acceda <https://colecturiavirtual.hacienda.pr.gov/portal> bajo el enlace de "Servicios" o puede visitar cualquiera de nuestras colecturías de Rentas Internas o cualquiera de nuestros Centros de Servicio al Contribuyente alrededor de la isla. Para detalles de estas localizaciones puede acceder a [www.hacienda.pr.gov](http://www.hacienda.pr.gov).

VALIDACIÓN:

Para verificar si este Certificado es válido, vaya a <https://suri.hacienda.pr.gov> y presione el enlace de "Verificar Certificado". Este Certificado es válido hasta 30 días después de la fecha de emisión.



## CERTIFICADO DE REGISTRO DE COMERCIANTE

**Nombre Localidad:**

**EDICIONES SM, INC.**  
BO PALMAS INDUSTRIAL PARK 776 SUITE 2  
CALLE 7  
CATANO PR 00962

**Nombre Legal:**

**EDICIONES SM INC.**  
BO PALMAS 776 CALLE 7  
STE 2  
CATANO PR 00962-7009

# 0197459-0038

## AGENTE RETENEDOR

**Fecha de Emisión:**

03-may-2017

**Fecha de Expiración:**

28-feb-2020

**Tipo de Certificado:** Comerciante

**Código NAICS:**

51113

42492

61169

**Actividad Comercial:**

Editoriales de Libros

Comerciantes Mayoristas de Libros y Publicaciones Periódicas

Otros Servicios Educativos

Certifico que este comerciante está inscrito en el Registro de Comerciantes del Departamento de Hacienda.

**Secretario Auxiliar de Rentas Internas**

Este Certificado no es transferible y el mismo deberá exhibirse en todo momento en un lugar visible al público en la localidad indicada.



**L0684538880**



**GOBIERNO DE PUERTO RICO**  
**Departamento de la Familia**  
Administración para el Sustento de Menores

**CERTIFICACIÓN PATRONAL DE CUMPLIMIENTO**

*EMPLOYER COMPLIANCE CERTIFICATE*

**Fecha de emisión:** 10/1/2018  
*Issue date:*

**Nombre del patrono:** EDICIONES SM  
*Company name:*

**Dirección:** P O BOX 50091  
*Address:*

**TOA BAJA, PR - 00950-0000**

**Número patronal federal:** 660644462  
*FEIN:*

**Número de participante:** 0002003653  
*Participant number:*

Se ha efectuado una búsqueda en nuestro sistema de manejo de casos y nuestro registro de pagos refleja que el cumplimiento de la persona jurídica que antecede es:

*A search in our case management system and payment registry reflects that the above named legal entity compliance status is:*

Está cumpliendo con la(s) orden(es) de retención de ingreso según establecida(s) en todos los casos.  
*It is complying with all the income withholding orders as established in all cases.*

Al presente, NO existe ninguna orden de retención de ingresos activa que lo obligue como patrono.  
*There is no active income withholding order to comply with, at present.*

Este documento resume la información contenida en el sistema mecanizado (PRACSES) de la Administración para el Sustento de Menores. De la búsqueda en nuestro registro de pagos recibidos se desprende que la información que antecede es correcta. La información de este documento es válida por treinta (30) días, a partir de la fecha de su emisión.

*This document summarizes the information contained in the Administration for Child Support Enforcement automated system (PRACSES). A search in our received payments registry shows that the information above is correct. The information contained in this document is valid for thirty (30) days from its issue date.*

**NOTA DE CONFIDENCIALIDAD:** La información contenida en este documento y cualquier anejo del mismo es confidencial y privilegiada y tiene el propósito de que sólo sea utilizado por la persona identificada en el mismo.

*CONFIDENTIALITY NOTE: The information contained in this document and any attachment is confidential and privileged and has the purpose of being used only by the person identified in it.*

**2018100120181031274724**



Gobierno de Puerto Rico

## CERTIFICADO DE CUMPLIMIENTO ("GOOD STANDING")

Yo, **LUIS G. RIVERA MARÍN**, Secretario de Estado del Gobierno de Puerto Rico,

**CERTIFICO:** Que, **SM, INC.**, registro número **145516**, una corporación doméstica con fines de lucro organizada bajo las leyes de Puerto Rico el **23 de julio de 2004**, ha cumplido con la radicación de sus Informes Anuales.



**EN TESTIMONIO DE LO CUAL**, firmo el presente y hago estampar en él el Gran Sello del Gobierno de Puerto Rico, en la ciudad de San Juan, Puerto Rico, hoy, **01 de octubre de 2018**.

**LUIS G. RIVERA MARÍN**  
Secretario de Estado

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Para validar este certificado acceda a: <http://estado.pr.gov/>

Este certificado podrá ser validado un número ilimitado de veces antes de la fecha de expiración 01-oct-2019.

Número de Validación del Certificado: **270035-15358057**



Barrio Palmas 776 Calle 7 Suite 2  
Cataño, Puerto Rico 00962

Tel: (787)625-9800  
Fax: (787)523-3886  
PO Box 50091 Toa Baja, PR 00950-0091

## Resolución Corporativa

Yo, Sheilla M. Vázquez Benítez, casada, mayor de edad, vecina de Dorado, Directora de Finanzas y Operaciones, en calidad de Secretaria de la Corporación, Certifico :

Que la Junta de Directores se reunió en sesión ordinaria celebrada el día 29 de noviembre de 2017, a la cual asistió el quorum reglamentario y resolvió autorizar a los oficiales nombrados a continuación para que cualquiera de ellos a nombre y en representación de esta corporación, pueda comparecer a los procesos de compra y firma de contratos de servicios profesionales y no profesionales realizados por el Departamento de Educación, agendas de la Rama Ejecutiva del Estado Libre Asociado de Puerto Rico, Corporación públicas y municipios, así como firmar ofertas y suscribir todo tipo de descuento requerido como parate de dicha comparecencia, por lo que sus firmas, las cuáles se hacen constar en este document, obligan a esta Corporación.

Y PARA QUE ASÍ CONSTE firmo y sello esta Certificación con el sello de la Corporación, en Cataño, Puerto Rico, hoy 22 de marzo de 2018.

Firmas autorizadas:

Sheilla M. Vázquez, casada, vecina de Dorado,  
Directora de Finanzas y Operaciones, persona autorizada a firmar

Juan Reyes Pérez, Casado, vecino de Morovis  
Presidente y Director General, persona autorizada a firmar

Sheilla M. Vázquez  
Secretario de la Corporación



**TAB 15**

**W-9 (IRS)**

## Solicitud y Certificación del Número de Identificación del Contribuyente

► Visite [www.irs.gov/FormW9SP](http://www.irs.gov/FormW9SP) para obtener las instrucciones y la información más reciente.

Entregue el formulario al solicitante. No lo envíe al IRS.

Escriba en letra de molde o a máquina. Vea Instrucciones Específicas en la página 3.

<b>1</b> Nombre (tal como aparece en su declaración de impuestos sobre el ingreso). Se le requiere anotar un nombre en esta línea; no deje esta línea en blanco. <b>Ediciones SM, Inc.</b>	
<b>2</b> Nombre del negocio/Nombre de la entidad no considerada como separada de su dueño, si es diferente al de arriba	
<b>3</b> Marque el encasillado correspondiente para la clasificación tributaria federal de la persona cuyo nombre se indica en la línea 1. Marque solo <b>uno</b> de los siguientes 7 encasillados: <input type="checkbox"/> Individuo/empresario por cuenta propia o LLC de un solo miembro <input checked="" type="checkbox"/> Sociedad anónima tipo C <input type="checkbox"/> Sociedad anónima tipo S <input type="checkbox"/> Sociedad colectiva <input type="checkbox"/> Fideicomiso/caudal hereditario <input type="checkbox"/> Cia. de responsabilidad limitada (LLC). Anote la clasificación tributaria (C=Soc. anónima tipo C, S=Soc. anónima tipo S, P=Soc. colectiva) ► _____ <b>Nota:</b> Marque el encasillado correspondiente en la línea anterior de la clasificación tributaria de la LLC de un solo miembro. No marque LLC si la LLC está clasificada como una de un solo miembro que no es considerada separada de su dueño, a menos que el dueño sea otra LLC que <b>no</b> es considerada separada de su dueño para propósitos tributarios federales estadounidenses. De lo contrario, vea las instrucciones en la página 3. <input type="checkbox"/> Otro (vea las instrucciones) ► _____	<b>4</b> Exenciones (los códigos aplican solo a ciertas entidades, no a individuos; vea las instrucciones en la página 4): Código de beneficiario exento (si alguno) _____ Código para la exención de la declaración conforme a FATCA (si alguno) _____ (aplica a las cuentas mantenidas fuera de los EE.UU.)
<b>5</b> Dirección (número, calle y número de apartamento o de suite). Vea las instrucciones. <b>Barrio Palmas 776, Calle 7 suite 2</b>	Nombre y dirección del solicitante (opcional)
<b>6</b> Ciudad, estado y código postal (ZIP) <b>Cataño PR 00962</b>	
<b>7</b> Anote el (los) número(s) de cuenta(s) aquí (opcional)	

### Parte I Número de identificación del contribuyente (TIN)

Anote su número de identificación del contribuyente (TIN, por sus siglas en inglés) en el encasillado correspondiente. El TIN tiene que concordar con el nombre provisto en la línea 1 para evitar la retención adicional del impuesto. Para los individuos, este es, por lo general, su número de Seguro Social (SSN, por sus siglas en inglés). Sin embargo, para un extranjero residente, empresario por cuenta propia o entidad no considerada como separada de su dueño, vea las instrucciones para la Parte I, más adelante. Para otras entidades, es su número de identificación del empleador (EIN, por sus siglas en inglés). Si no tiene un número, vea **Cómo obtener un TIN**, más adelante.  
**Nota:** Si la cuenta está a nombre de más de una persona, vea las instrucciones para la línea 1. Vea también **Nombre y número que se le debe dar al solicitante** para recibir asesoramiento sobre cuál número debe anotar.

<b>Número de Seguro Social</b>									
o									
<b>Número de identificación del empleador</b>									
6	6	-	0	6	4	4	4	6	2

### Parte II Certificación

Bajo pena de perjurio, yo declaro que:

- El número que aparece en este formulario es mi número de identificación de contribuyente correcto (o estoy esperando que me asignen un número) y
- No estoy sujeto a la retención adicional de impuestos porque: (a) estoy exento de la retención adicional o (b) no he sido notificado por el Servicio de Impuestos Internos (IRS, por sus siglas en inglés) de que estoy sujeto a la retención adicional de impuestos como resultado de no declarar todos los intereses o dividendos o (c) el IRS me ha notificado que ya no estoy sujeto a la retención adicional y
- Soy ciudadano de los EE.UU. u otra persona de los EE.UU. (definido después) y
- El (los) código(s) de la *Foreign Account Tax Compliance Act* (Ley de Cumplimiento Tributario para Cuentas Extranjeras o FATCA, por sus siglas en inglés) anotado(s) en este formulario (si alguno) indicando que estoy exento de declarar conforme a FATCA es el (son los) correcto(s).

**Instrucciones para la certificación.** Tiene que tachar la partida 2 anterior si el IRS le ha notificado que usted en estos momentos está sujeto a la retención adicional de impuestos porque no declaró todos los intereses y dividendos en su declaración de impuestos. Para las transacciones de bienes inmuebles, la partida 2 no corresponde. Para los intereses hipotecarios pagados, la adquisición o abandono de bienes asegurados, la cancelación de deudas, las contribuciones a un arreglo de jubilación individual (IRA, por sus siglas en inglés) y, por lo general, los pagos que no sean intereses y dividendos, no se le requiere firmar la certificación, pero tiene que proveer su TIN correcto. Vea las instrucciones para la Parte II, más adelante.

**Firma Aquí**

Firma de la persona de los EE.UU. ►



Fecha ►

10/3/18

### Instrucciones Generales

Las secciones a las cuales se hace referencia son del Código Federal de Impuestos Internos, a menos que se indique de otra manera.

**Acontecimientos futuros.** Si desea obtener información sobre los más recientes acontecimientos que afectan al Formulario W-9(SP) y sus instrucciones, tales como legislación promulgada después de que estos se han publicado, visite [www.irs.gov/FormW9SP](http://www.irs.gov/FormW9SP).

### Propósito del formulario

Una persona o entidad (nombrada en el Formulario W-9(SP)) a quien se le requiera presentar una declaración informativa ante el IRS tiene que obtener su TIN correcto, el cual puede ser su SSN, número de identificación del contribuyente (ITIN, por sus siglas en inglés), número de identificación del contribuyente para adopción (ATIN, por sus siglas en inglés) o EIN, para declarar en una declaración informativa la cantidad pagada a usted, u otra cantidad declarada en una declaración informativa. Ejemplos de declaraciones de información incluyen, pero no se limitan a, los siguientes:

**TAB 16**

**Mobile Device Specifications –*Mandatory***

**PROPOSAL SUBMITTAL FORM 10: MOBILE DEVICE SPECIFICATIONS**

Instructions: Complete this worksheet for each type of technology solution proposed. Fill in each blank with the requested information. You may attach additional pages to provide complete information where required. This RFP does not require that all these fields be accounted for, but if a Proposer is providing an option that fits one of these categories, these fields must be completed. Please specify which items are optional, if any. If additional items (fields) need to be added to this list of products and services to best reflect your proposed solution, please make note of this and add any necessary data.

**Mobile Device Description**

Manufacturer	
Model	
Processor	
Graphics	
Memory	
I/O (Input/Output) Ports	
Connectivity	
Hard Drive Type	
Hard Drive Capacity	
Camera	
Display Type	
Display Size	
Display Resolution	
Battery Capacity (ex. 7200mAh)	
Duration (ex. 8 hrs.)	
Dimensions (W x D x H)	
Weight (lbs)	
Accessories included (if any)	

<b>Provide industry benchmark test results, including information about how long the device will operate on a single battery charge under these conditions:</b>	
<b>Activity</b>	<b>Time</b>
Web-browsing	
Multimedia (video/audio)	
Reading eBooks	
Stand by time	

**TAB 17**

**Device Proposal Functionality Compliance Form - *Mandatory***

**TAB 17: PROPOSAL SUBMITTAL FORM 11: PROFESSIONAL DEVELOPMENT, CURRICULUM INTEGRATION AND TECHNICAL TRAINING**

<b>Mentoring</b>	• Individual process (1-1) and personalized, which is led by people with vast/recognized experience in the topic.
	• It must be offered continuously and consistently.
	• The mentor must have more experience than the participant in the academic area in which he is offering the service.
	• It will take place in the workplace (job-embedded).
	• 10 contact hours
<b>Coaching</b>	• Process with up to three participants that are led by people with vast/recognized experience in the topic.
	• It is integrated to the workspace, which aims to implement new strategies, scientifically proven and effective, relevant to the classroom.
	• Between 2 and 3 contact hours.
<b>Demonstration classes/Webinar</b>	• These can be offered individually or in groups.
	• Focused on the occupational and technical subjects and the relevant educational strategies, with the participation of a specialist that succeeds in demonstrating the conceptual development and application of the concepts.
	• In the case of groups, the number of participants must be between 10 to 30 for each group.
<b>Workshop</b>	• Between 2 and 4 hours contact.
	• Each topic will be covered in one or several days with a total of six (6) contact hours
	• They have to integrate theory with practice as the driving force of the pedagogical process to develop and improve knowledge, skills, abilities and attitudes of each participant.
	• The workshops have to provide space for participation, conceptualization and reflection.
	• The number of participants must be no less than 10 and no more than 30 for each group.
	• Each topic will be covered in one or several days with a total of six (6) contact hours.
<b>Seminars</b>	• Must provide the opportunity to build knowledge through interaction and activity.
	• Include supervised sessions with shared participation (teachers, students, experts, etc.)
	• The number of participants must be no less than 31 and no more than 100, for each group.
	• They can be using by Web-Based Seminars mode.

**TAB 18**

**Project Plan and Schedule with Dates for Deployment and Professional Development– *Mandatory***

**TAB 18: PROJECT PLAN AND DEPLOYMENT SCHEDULE**

**GOAL 1:** Update the traditional school computer lab environment to an innovative environment in each school classroom, where technology is integrated to the curriculum.

**SCOPE:** Design and develop a personalized plan for all (100%) of the participating schools during the 2018-2019 academic year, based on the *methods and resources that will help educators of the Department of Education to master the fundamental skills and required tools to succeed in integrating technology to students' learning processes.*

**RANGE:1.** Explain **Formación AulaTec:** modalities, strategies, transfer, and evaluation. **1<sup>st</sup>trimester 10 weeks.**

**RANGE:2.** Use and management of equipment, mobile devices, technology integration, and curriculum integration. **2<sup>nd</sup> trimester 10 weeks**

**RANGE:3.** Create a culture of technological instruction and create a teacher mentoring program. **3<sup>rd</sup> trimester 10 weeks.**

Objectives	Activities	Compliance: task and date	Personnel Responsible	Evaluation Instrument
<p>1. Establish an <b>assistance program for the use and management of technology and technology integration to help the Department of Education identify, catalog, and distribute best practices for mobile technology within the district.</b></p> <p>2. Establish a <b>technology literacy program for mobile devices, curriculum integration, and technology integration process adopted by the DE; and promote and ensure that all educators understand the district expectations.</b></p>	<p><b>1.1 Discuss</b> the Formación AulaTec project.</p> <p><b>1.2 Identify</b> specialists who communicate the interests of educators regarding the methods of technology use and integration.</p> <p><b>1.3 Evaluate</b> the technology efforts made and determine their level of effectiveness.</p> <p><b>1.4 Create</b> an intervention, practice, support, and activity catalog for technology use and integration once the assistance program starts.</p> <p><b>2.1 Assess</b> the information literacy needs of teaching community.</p> <p><b>2.2 Draft</b> protocols and expectations to meet the levels of curriculum integration.</p> <p><b>2.3 Survey</b> interests, talents, skills, attitudes, and inclinations to offer technology and technology integration services in the school.</p>	<p><b><u>1<sup>st</sup> trimester Nov. 29 - Jan. 4 2019:</u></b></p> <ul style="list-style-type: none"> <li>• Study the Comprehensive School Plan and the Work Plan.</li> <li>• Disseminate the goals and objectives of the <b>Formación AulaTec</b> project to the teaching community.</li> <li>• Research the intervention strategies mentioned in the <b>Formación AulaTec</b> project.</li> <li>• Create work committees to address the coordination of the curriculum, instruction, technology, equipment, and other areas.</li> <li>• Analyze academic achievement data: META-PR.</li> <li>• Administer and tabulate needs assessment: academic and technological skills.</li> <li>• Form a committee for communication and publication</li> <li>• Establish communication protocols with OSIATD.</li> </ul>	<ul style="list-style-type: none"> <li>• School Director</li> <li>• OSIATD Staff</li> <li>• Project Director</li> <li>• Project Coordinator</li> <li>• Teacher Coordinators</li> <li>• Family Committees</li> <li>• Community Members</li> <li>• Community leaders bringing needs related to technology use and management and technology integration</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation sheets</li> <li>• Group logs on their participation in technology projects</li> <li>• Progress reports</li> <li>• Attendance to the program in question</li> <li>• Implementation management techniques to evidence the effect of the intervention in professional development (use any sheet or document for this purpose)</li> <li>• Intervention evaluation and progress statistics</li> </ul>

Objectives	Activities	Compliance: task and date	Personnel Responsible	Evaluation Instrument
<p>3. Establish a <i>curriculum and technology integration program to determine the basic technology and technology integration skills of the entire teaching staff.</i></p> <p>4. Provide a <b>technology services program to identify and address existing barriers and challenges to advancing curriculum and technology integration by discipline, school, and grade level.</b></p>	<p><b>3.1 Expose</b> educators to activities that aid their teaching experiences.</p> <p><b>3.2 Create</b> a series of activities to promote sustained and systematic technology integration.</p> <p><b>4.1 Implement</b> integration phases for the three instructional strategies: technology, curriculum, and differentiated education.</p> <p><b>4.2 Document</b> existing technology and curriculum integration challenges by discipline and grade level to keep educators forewarned.</p>	<p><u><b>2<sup>nd</sup> trimester Jan. 7 - Mar. 15 2019</b></u></p> <ul style="list-style-type: none"> <li>• Start the professional development workshop program for teachers and students.</li> <li>• Register participation.</li> <li>• Implement classroom learning transfer sheets.</li> <li>• Create technology support networks and recruit participants.</li> <li>• Create synchronous communication spaces (using suggestion boxes, query emails, etc.).</li> <li>• Establish communication protocols with OSIATD.</li> </ul>	<ul style="list-style-type: none"> <li>• School Director</li> <li>• OSIATD Staff</li> <li>• Project Director</li> <li>• Project Coordinator</li> <li>• Teacher Coordinators</li> <li>• Family Committees</li> <li>• Community Members</li> <li>• Community leaders bringing needs related to technology use and management and technology integration</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation sheets</li> <li>• Group logs on their participation in technology projects</li> <li>• Progress reports</li> <li>• Attendance to the program in question</li> <li>• Implementation management techniques to evidence the effect of the intervention in professional development (use any sheet or document for this purpose)</li> <li>• Intervention evaluation and progress statistics</li> </ul>
Objectives	Activities	Compliance: task and date	Personnel Responsible	Evaluation Instrument
<p>5. Foster awareness among the teaching community regarding a <b>focus on a technological culture to validate the current levels of technology integration into the curriculum of each discipline and grade level.</b></p> <p>6. Provide a program <b>aimed at technology integration to establish and promote the use of mentor/mentee to monitor support models to advance technology best practices.</b></p>	<p><b>5.1 Analyze</b> the needs of the teaching community to favor technology integration activities.</p> <p><b>5.2 Create</b> encounters between educators to form learning communities based on their interests and promote a technology integration culture.</p> <p><b>6.1 Recruit</b> educators who may serve as mentors and expose them to activities related to these purposes.</p> <p><b>6.2 Provide orientation and raise awareness</b> among the community on evaluation interventions for models and strategies to remain empowered over their own knowledge.</p>	<p><u><b>3<sup>rd</sup> trimester Mar. 18 – Jun. 7 2019</b></u></p> <ul style="list-style-type: none"> <li>• Continue the professional development workshop program with sporadic online meetings.</li> <li>• Implement transfer sheets.</li> <li>• Measure participants' perceptions of professional development satisfaction and quality.</li> <li>• Obtain educator and student performance and proficiency metrics.</li> <li>• Create learning communities and recruit participants.</li> <li>• Establish communication protocols with OSIATD.</li> </ul>	<ul style="list-style-type: none"> <li>• School Director</li> <li>• OSIATD Staff</li> <li>• Project Director</li> <li>• Project Coordinator</li> <li>• Teacher Coordinators</li> <li>• Family Committees</li> <li>• Community Members</li> <li>• Community leaders bringing needs related to technology use and management and technology integration</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation sheets</li> <li>• Group logs on their participation in technology projects</li> <li>• Progress reports</li> <li>• Attendance to the program in question</li> <li>• Implementation management techniques to evidence the effect of the intervention in professional development (use any sheet or document for this purpose)</li> <li>• Intervention evaluation and progress statistics</li> </ul>

**GOAL 2:** Offer professional development and curriculum integration services to students, educators, and OSIATD staff.

**SCOPE:** Design and develop a personalized plan for all (100%) of the participating schools during the 2018-2019 academic year, based on the *methods and resources that will help educators of the Department of Education to master the process of integrating technology and curriculum integration strategies to succeed in the use and management of the acquired technological devices.*

**RANGE:** Explain **Formación AulaTec and its online component** and/or supplementary access technologies through mobile devices. Offer professional development using case study and meaningful learning strategies, and create with educators, students, and OSIATD staff projects based on technology use and management, and technology and instruction integration. **4<sup>th</sup> trimester 10 weeks.**

Objectives	Activities	Compliance: task and date	Personnel Responsible	Evaluation Instrument
<p>1. Implement a sustained professional development program on:</p> <ul style="list-style-type: none"> <li>• <i>devices for educators;</i></li> <li>• <i>Windows, OneNote, and Office 365 applications</i></li> <li>• <i>and classroom management apps.</i></li> </ul> <p>2. Design and practice the professional development <b>online and complement it with web activities to achieve asynchronous online interaction and employing learning communities.</b></p>	<p><b>1.1 Establish in</b> the teaching community levels (intermediate and advanced) of the training program to:</p> <ul style="list-style-type: none"> <li>• Use and manage laptops and tablets</li> <li>• Technology integration and curriculum integration</li> </ul> <p><b>1.2 Master</b> the service protocol (educators and OSIATD staff) with Windows, OneNote, and Office 365 apps.</p> <p><b>1.3 Publish</b> the study and in-depth analysis conducted by the teaching team regarding classroom management apps.</p> <p><b>2.1 Promote</b> a campaign to change from a traditional educational paradigm to an innovative paradigm mediated by technology.</p> <p><b>2.2 Create</b> participation profiles for educators and students and measure their logins to online professional development programs.</p>	<p><b><u>4<sup>th</sup> trimester Aug. 5 – Oct. 11 2019</u></b></p> <ul style="list-style-type: none"> <li>• Measure participants' academic performance.</li> <li>• Promote an online professional development program.</li> <li>• Create web-based activities of synchronic interest with suggestions for open source apps for educators to integrate these tools to the classroom.</li> <li>• Study using digital materials as part of their professional development.</li> <li>• Establish communication protocols with OSIATD.</li> </ul>	<ul style="list-style-type: none"> <li>• School Director</li> <li>• OSIATD Staff</li> <li>• Project Director</li> <li>• Project Coordinator</li> <li>• Teacher Coordinators</li> <li>• Family Committees</li> <li>• Community Members</li> <li>• Community leaders bringing needs related to technology use and management and technology integration</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation sheets</li> <li>• Group logs on their participation in technology projects</li> <li>• Progress reports</li> <li>• Attendance to the program in question</li> <li>• Implementation management techniques to evidence the effect of the intervention in professional development (use any sheet or document for this purpose)</li> <li>• Intervention evaluation and progress statistics</li> </ul>

**TAB 19**

**Financial Statements - *Mandatory***



**Ediciones SM, Inc.**  
**Statutory Report and**  
**Consolidated Financial Statements**  
**December 31, 2017**



## Report of Independent Auditors

### On Consolidated Balance Sheet Filed with the Department of State

To the Board of Directors and Management of  
Ediciones SM, Inc.

We have audited the accompanying consolidated balance sheet of Ediciones SM, Inc. as of December 31, 2017.

#### *Management's Responsibility for the Consolidated Balance Sheet*

Management is responsible for the preparation and fair presentation of the consolidated balance sheet in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of a consolidated balance sheet that is free from material misstatement, whether due to fraud or error.

#### *Auditors' Responsibility*

Our responsibility is to express an opinion on the consolidated balance sheet based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated balance sheet is free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated balance sheet. The procedures selected depend on our judgment, including the assessment of the risks of material misstatement of the consolidated balance sheet, whether due to fraud or error. In making those risk assessments, we consider internal control relevant to the Company's preparation and fair presentation of the consolidated balance sheet in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Company's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated balance sheet. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### *Opinion*

In our opinion, the accompanying consolidated balance sheet presents fairly, in all material respects, the financial position of Ediciones SM, Inc. as of December 31, 2017 in accordance with accounting principles generally accepted in the United States of America.



**Opinion**

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of Ediciones SM, Inc as of December 31, 2017, and the results of operations and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

**Other Matters**

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements taken as a whole. The consolidating information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The consolidating information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves and other additional procedures, in accordance with auditing standards generally accepted in the United States of America. In our opinion, the consolidating information is fairly stated, in all material respects, in relation to the consolidated financial statements taken as a whole. The consolidating information is presented for purposes of additional analysis of the consolidated financial statements rather than to present the financial position, results of operations and cash flows of the individual companies and is not a required part of the consolidated financial statements. Accordingly, we do not express an opinion on the financial position and results of operations of the individual companies.

The Company has extensive transactions and relationships with affiliated companies, as disclosed in the consolidated financial statements and related notes. Our opinion is not modified with respect to this matter.

**Restriction of Use**

This report is intended solely for the information and use of the Board of Directors and management of the Company and the agencies of the Commonwealth of Puerto Rico responsible for the administration of the income tax, municipal license tax, or property tax and is not intended to be and should not be used by anyone other than these specified parties.



*PricewaterhouseCoopers LLP*  
By *Janier Vizcarra*  
License No. 4562

San Juan, Puerto Rico  
July 27, 2018

**Ediciones SM, Inc.**  
**Index**  
**December 31, 2017**

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	<b>Page(s)</b>
<b>Report of Independent Auditors</b> .....	1-4
<b>Consolidated Financial Statements</b>	
Consolidated Balance Sheet.....	5
Consolidated Statement of Operations and Changes in Retained Earnings.....	6
Consolidated Statement of Cash Flows.....	7
Notes to Consolidated Financial Statements.....	8-12

**INDEX TO SUPPLEMENTAL SCHEDULES**

Supplementary Consolidating Balance Sheet as of December 31, 2017	ii
Supplementary Consolidating Statement of Income for the year ended December 31, 2017	iii

**Ediciones SM, Inc.**  
**December 31, 2017**

**Supplementary Consolidating Balance Sheet**  
**As of December 31, 2017**

	Ediciones SM, Inc.		ISME LLC		Subtotal		Elimination		Ediciones SM, Inc., Consolidated
	Debit	Credit	Debit	Credit	Debit	Credit	Debit	Credit	
<b>Assets</b>									
Current assets									
Cash	\$ 5,212,185	\$ 9,835	\$ 5,222,020						\$ 5,222,020
Accounts receivable, net	672,887	19,636	692,523						692,523
Inventories, net of reserve for slow moving and obsolete items of \$389,888	890,727	-	890,727						890,727
Due from affiliates	69,771	-	69,771				69,771		-
Prepaid expenses	172,428	-	172,428						172,428
Loan to affiliate	2,500,000	-	2,500,000						2,500,000
Total current assets	9,517,998	29,471	9,547,469						9,477,698
Prepublication costs	646,933	-	646,933						646,933
Property, plant and equipment, net	494,396	-	494,396						494,396
Other assets	19,316	-	19,316						19,316
Deferred tax assets	472,005	-	472,005						472,005
Investment in subsidiary at cost *	10,000	-	10,000				10,000		-
	\$ 11,160,648	\$ 29,471	\$ 11,190,119						\$ 11,110,348
<b>Liabilities and Member's Equity/stockholder's Equity</b>									
Current liabilities									
Accounts payable	\$ 432,606	4,763	437,369						437,369
Accrued liabilities	1,182,798	-	1,182,798						1,182,798
Due to affiliates	564,399	69,771	634,170			69,771			564,399
Total current liabilities	2,179,803	74,534	2,254,337						2,184,566
Member's equity/stockholder's equity									
Member's units/common stocks	10,770	10,000	20,770			10,000			10,770
Contributed capital/additional paid-in capital	5,872,497	-	5,872,497						5,872,497
Accumulated earnings	3,097,578	(55,063)	3,042,515						3,042,515
Total member's equity/stockholder's equity	8,980,845	(45,063)	8,935,782						8,925,782
	\$ 11,160,648	\$ 29,471	\$ 11,190,119						\$ 11,110,348

**Ediciones SM, Inc.  
December 31, 2017**

**Supplementary Consolidating Statement of Income  
For the year-ended December 31, 2017**

	Ediciones SM, Inc.	ISME LLC	Subtotal	Elimination	Ediciones SM, Inc., Consolidated
				Debit	Credit
Net sales	\$ 7,216,315	-	\$ 7,216,315		\$ 7,216,315
Seminars and educational programs	3,167,783	19,636	3,187,419		3,187,419
Other operating income	81,634	-	81,634		81,634
	<u>10,465,732</u>	<u>19,636</u>	<u>10,485,368</u>		<u>10,485,368</u>
Cost and expenses, including depreciation and					
Cost of sales	1,219,253	-	1,219,253		1,219,253
Cost of seminars and educational programs	1,929,389	4,763	1,934,152		1,934,152
Selling, general and administrative, including depreciation expense of \$261,265	6,836,754	69,936	6,706,690		6,706,690
Total cost and expenses	<u>9,785,396</u>	<u>74,699</u>	<u>9,860,095</u>		<u>9,860,095</u>
Income before income taxes	680,336	(55,063)	625,273		625,273
Income tax expense (benefit)					
Current	457,525	-	457,525		457,525
Deferred	(157,677)	-	(157,677)		(157,677)
	<u>299,848</u>	<u>-</u>	<u>299,848</u>		<u>299,848</u>
Net income	380,488	(55,063)	325,425		325,425
Retained Earnings					
Beginning of year	2,717,090	-	2,717,090		2,717,090
End of year	<u>\$ 3,097,578</u>	<u>\$ (55,063)</u>	<u>\$ 3,042,515</u>		<u>\$ 3,042,515</u>

**Ediciones SM, Inc.**  
**Consolidated Balance Sheet**  
**December 31, 2017**

<b>Assets</b>	
Current assets	
Cash	\$ 5,222,020
Receivables, net of allowance for doubtful accounts of \$69,296	692,523
Inventories, net of allowances for excess and obsolescence of \$389,888	890,727
Prepaid expenses	172,428
Loan to affiliate	2,500,000
Total current assets	<u>9,477,698</u>
Prepublication costs	646,933
Property and equipment, net	494,396
Other assets	19,316
Deferred tax assets	472,005
Total assets	<u>\$ 11,110,348</u>
<b>Liabilities and Stockholders' Equity</b>	
Current liabilities	
Account payable	\$ 437,369
Accrued liabilities	1,182,798
Due to affiliate	564,399
Total current liabilities	<u>2,184,566</u>
Stockholders' equity	
Common stock \$10 par value; 1,100 shares authorized; 1,077 issued and outstanding	10,770
Additional paid-in capital	5,872,497
Retained earnings	3,042,515
Total stockholders' equity	<u>8,925,782</u>
Total liabilities and stockholders' equity	<u>\$ 11,110,348</u>

The accompanying notes are an integral part of these financial statements.

**Ediciones SM, Inc.**  
**Consolidated Statement of Operations and Changes in Retained Earnings**  
**Year Ended December 31, 2017**

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<b>Revenues</b>	
Net sales	\$ 7,216,315
Seminars and educational programs	3,187,419
Other operating income	<u>81,634</u>
	<u>10,485,368</u>
<b>Cost and expenses</b>	
Cost of Sales	1,219,253
Cost of seminars and educational programs	1,934,152
Selling, general and administrative, including depreciation expense of \$261,265	<u>6,706,690</u>
Total cost and expenses	<u>9,860,095</u>
Income before income taxes	<u>625,273</u>
<b>Income tax expense (benefit)</b>	
Current	457,525
Deferred	<u>(157,677)</u>
Total Income tax expense	<u>299,848</u>
Net Income	<u>325,425</u>
<b>Retained earnings</b>	
Beginning of year	<u>2,717,090</u>
End of year	<u>\$ 3,042,515</u>

The accompanying notes are an integral part of these financial statements.

**Ediciones SM, Inc.**  
**Consolidated Statement of Cash Flows**  
**Year Ended December 31, 2017**

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<b>Cash flows from operating activities</b>	
Net income	\$ 325,425
Adjustment to reconcile net income to net cash provided by operating activities	
Depreciation and amortization	261,265
Reversal/Provision for excess and obsolete inventory reserve	(96,057)
Provision for doubtful accounts	1,704
Amortization of prepublication costs	338,709
Loss on sale of property	35
Deferred income tax benefit	(157,677)
Changes in assets and liabilities which increased (decrease) cash	
Receivable	1,891,532
Inventories	322,769
Prepaid expenses and other assets	(100,185)
Accrued liabilities	166,766
Accounts payable	(250,068)
Income tax payable	(5,972)
Due to affiliates	234,539
Net adjustments	<u>2,607,360</u>
Net cash provided by operating activities	<u>2,932,785</u>
<b>Cash flows from investing activities</b>	
Investment in prepublication costs	(336,585)
Loan to affiliate	(2,500,000)
Acquisition of property and equipment	<u>(353,740)</u>
Net cash flows used in investing activities	<u>(3,190,325)</u>
Net decrease in cash	(257,540)
<b>Cash and cash equivalents</b>	
Beginning of year	<u>5,479,560</u>
End of year	<u>\$ 5,222,020</u>
<b>Supplementary information</b>	
Income tax paid	\$ 461,200

The accompanying notes are an integral part of these financial statements.

**Ediciones SM, Inc.**  
**Notes to Consolidated Financial Statements**  
**December 31, 2017**

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**1. Organization and Summary of Significant Accounting Policies**

Ediciones SM, Inc. (the "Company") was organized under the laws of the Commonwealth of Puerto Rico. The principal activities of the Company are the publishing and distribution of educational books in Puerto Rico. In addition, the Company provides Seminars and Education Programs to the Public School System and Private Schools.

At December 31, 2017, stockholders' ownership is as follows:

Grupo Editorial SM Internacional, S.L.	86.63 %
Marianist Province of the USA	10.12 %
Comercializadora SM, S.A.	3.25 %

The accompanying consolidated financial statements include the accounts of Ediciones SM, Inc. and its wholly-owned subsidiary ISME LLC. All significant intercompany balances and transactions have been eliminated.

ISME LLC is a Puerto Rico limited liability company, wholly-owned by Ediciones SM, Inc., engaged in providing Seminars and Education Programs to the Public School System.

**Use of Estimates**

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America ("US GAAP") requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities, disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results may differ from those estimates.

**Cash and Cash Equivalents**

The Company considers highly liquid investments with original maturities at the time of purchase of three months or less to be cash equivalents.

**Revenue Recognition**

The Company recognizes revenue when persuasive evidence of an arrangement exists, the sales price is fixed or determinable, products are shipped and the customer takes ownership and assumes risk of loss, and collection of the related receivable is probable. Shipping and other transportation costs charged to customers are recorded in both sales and cost of sales. Revenue from government contractual arrangements, such as contracts for seminars and workshops for teachers and professors, is recognized as performance occurs.

**Concentration of Credit Risk**

Financial instruments, which potentially subject the Company to concentrations of credit risk, consist principally of cash and accounts receivable. As of December 31, 2017, the Company maintained its cash in one financial institution. The Federal Deposit Insurance Corporation insures up to \$250,000 per legal entity per financial institution. At December 31, 2017, the Company's uninsured cash balance was approximately \$4,962,185. The Company performs ongoing credit evaluations of its customers' financial condition and generally does not require collateral for accounts receivable arising from the normal course of business. For concentration of credit risk arising from major customers, please refer to note 5.

**Ediciones SM, Inc.**  
**Notes to Consolidated Financial Statements**  
**December 31, 2017**

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**Trade Accounts Receivable**

Trade accounts receivable are recorded at the invoiced amount and do not bear interest. The Company maintains an allowance for doubtful accounts for estimated losses inherent in its accounts receivable portfolio. In establishing the required allowance, management considers historical losses, current receivables aging, and existing economic data. The Company reviews its allowance for doubtful accounts periodically. Account balances are written-off against the allowance after all means of collection have been exhausted and potential for recovery is considered remote.

**Inventories**

Inventories are stated at the lower of cost (weighted average method) or net realizable value. The allowance for inventory excess/obsolescence is based upon management's assessment of the marketplace of publications in demand, as compared to the number of units currently on hand.

**Prepublication Costs**

Costs associated with developing any publication are expensed until the product is determined to be commercially viable. Once commercial viability is determined, prepublication costs, primarily costs incurred to develop a publication such as design, authoring, illustration, typesetting, proofreading and printing, are capitalized. Prepublication costs are amortized from the year of publication based on an accelerated method as books of the first edition (which are generally printed based on the estimated demand for 2 years) are sold. The Company regularly reviews the recoverability of the capitalized costs based on expected future revenues.

**Property and Equipment**

Property and equipment, including leasehold improvements, are carried at cost less accumulated depreciation and amortization. Depreciation and amortization are computed using the straight-line method based on the estimated useful lives of the respective asset or terms of the lease, whichever is shorter.

Maintenance and repair expenses are charged to operations in the year in which they are incurred. Expenditures which result in the enhancement of the value of the facilities involved are capitalized. Upon retirement or other disposition of property, cost and the related allowances for depreciation are removed from the accounts and any gains or losses are recognized as part of current year operations.

**Impairment of Long-Lived Assets**

The Company evaluates their long-lived assets considering continued operating losses or significant and long-term changes in industry conditions as the primary indicators of potential impairment. Impairment is recognized when the future undiscounted cash flows of each asset is estimated to be insufficient to recover its related carrying value. If such carrying costs are not recoverable, the asset is written down to estimated fair value. Considerable management judgment is necessary to estimate future cash flows, accordingly, actual results could vary significantly from such estimates, requiring periodic revaluation based on current events or changes in circumstances. Based on these evaluations, there were no adjustments to the carrying values of long-lived assets during 2017.

**Advertising and Promotion Costs**

Advertising and promotion costs are expensed as incurred. During 2017, these costs amounted to approximately \$380,287 and are included in the selling, general and administrative expenses caption of the accompanying statement of operations.

**Ediciones SM, Inc.**  
**Notes to Consolidated Financial Statements**  
**December 31, 2017**

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**Income Tax**

The Company provides for income tax at Puerto Rico statutory rates. The Company utilizes the asset and liability method to account for income tax, which requires the recognition of deferred income tax assets and liabilities for the expected future tax consequences of events that have been recognized in the financial statements or tax returns. A valuation allowance is recognized for any deferred tax asset for which, based on management's evaluation, it is more likely than not that some portion or the entire deferred tax asset, will not be realized. The ultimate realization of deferred tax assets is dependent upon the generation of future taxable income during the periods in which those temporary differences become deductible. Management considers the scheduled reversal of deferred tax liabilities, projected future taxable income, and tax planning strategies in making this assessment.

The benefits of uncertain tax positions are recorded only where the position is more likely than not to be sustained based on its technical merits. The amount recognized is the amount that represents the largest amount of tax benefits that is greater than 50% likely of being ultimately realized. A liability is recognized for any benefit claimed, or expected to be claimed, in a tax return in excess of the benefit recorded in the financial statements, along with any interest and penalty (if applicable) on such excess. The Company has no uncertain tax positions as of December 31, 2017.

**Fair Value of Financial Instruments**

US GAAP defines fair value as the price that would be received on the sale of an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. It also establishes a fair value hierarchy, to prioritize the inputs used in valuation techniques.

At December 31, 2017, the Company does not have assets and liabilities that are measured at fair value.

**2. Property and Equipment**

Property and equipment at December 31, 2017 consisted of the following:

	<b>Useful Life</b> <i>(in years)</i>	
Leasehold improvements	-	\$ 650,706
Office furniture and equipments		535,004
Computer equipment and software		1,170,851
Autos		139,512
		<u>2,496,073</u>
Less: Accumulated depreciation and amortization		(2,001,677)
		<u>\$ 494,396</u>

**Ediciones SM, Inc.**  
**Notes to Consolidated Financial Statements**  
**December 31, 2017**

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**3. Income Tax**

The Puerto Rico income tax regime for corporate taxpayers is based on the maximum of the regular tax or the alternative minimum tax. Regular tax is based on marginal rates with a maximum effective tax rate of 39% whereas the alternative minimum tax is a 30% flat rate applicable over alternative minimum taxable income. Based on the current year's results of operations, the Company is a regular corporate taxpayer subject to maximum tax rate of 39%. The deferred tax asset as of December 31, 2017 consists of the following:

Bad debt reserve	\$ 27,025
Management Fees	192,777
Inventory reserve	152,056
Depreciation	<u>100,147</u>
Total deferred tax assets	<u>\$ 472,005</u>

The deferred tax asset was calculated at the statutory income tax rate of 39% which as of year-end is the enacted tax rate in Puerto Rico at the time this deferred tax asset is expected to be realizable. Management believes that a valuation allowance with respect to the realization of the gross deferred tax asset is not necessary. In assessing realizability, management considers whether it is more likely than not that some portion or the entire deferred tax asset will not be realized. The ultimate realization of the deferred tax assets is dependent upon the generation of future taxable income during the periods in which those temporary differences become deductible.

The effective income tax rate differs from the amount computed by applying the Puerto Rico statutory income tax rate of 39% to the income before income taxes as a result of permanent differences including the disallowance of management fees, meals and entertainment, and other miscellaneous permanent differences.

In Puerto Rico, the tax authority permits examination of tax returns for up to four years after the initial return is filed. The tax years open for examination for the Company is 2013 to 2017.

**4. Related Party Transactions**

During 2017, the Company purchased inventory from its majority stockholder and affiliates, amounting to approximately \$90,180. In addition, the Company sold inventory to affiliates amounting to approximately \$2,996.

During the year ended December 31, 2017, the entity was charged by one affiliate entity for approximately \$158,341 for management fees and \$551,566 by another affiliate for image services. Other miscellaneous transactions related to services made during the year between affiliates amounted to \$54,547.

In June 9, 2017, Ediciones SM, Inc. invested the amount of \$10,000 as only member of ISME LLC.

On July 19, 2017, the Company entered into a loan agreement with an affiliate under which the Company committed to lend \$2,500,000 to such affiliate. The loan bears an interest of 3.62% and principal and payment are due on April 4, 2018. The loan was collected on March 26, 2018.

**Ediciones SM, Inc.**  
**Notes to Consolidated Financial Statements**  
**December 31, 2017**

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**5. Sales to Major Customers**

During the year ended December 31, 2017, 62.6% of the Company's net sales were concentrated in three customers. The Company's major customers, who accounted for 10% or more of the net sales during year, were as follows:

Customer A	25.95 %
Customer B	19.82 %
Customer C	16.83 %

One of these customers accounted for 33% of accounts receivable trade as of December 31, 2017.

**6. Lease Commitments**

The Company leases equipment under various operating leases over periods ranging from one to six years. Additionally, the Company leases warehouse and office space under a lease agreement, which original term ended in 2014, and has subsequently continue with the lease agreement on a month-to-month basis.

The following table sets forth the aggregate minimum future annual rental commitments at December 31, 2017 under all operating leases for the fiscal years:

2018	\$	10,476
2019		4,824
	\$	<u>15,300</u>

The rent expense for the year ended December 31, 2017 was to \$215,208.

**7. Contingencies**

The Company is involved in one legal and administrative matter, generally related to its operations. Management believes that the outcome of such matter will not have a material effect on the financial position, cash flows or results of operations of the Company.

**8. Subsequent Events**

The Company has performed a review of subsequent events from January 1, 2017 through July 27, 2018, the date the financial statements were available to be issued, and concluded there were no events or transactions that occurred during this period that required recognition or disclosure on these financial statements.

**TAB 20**

**Joint Venture Documentation (If Applicable)**

**TAB 20: Joint Venture Documentation**

Not Applicable