

RFP 20-1941 BUSINESS PROPOSAL ATTACHMENT E

Instructions: Please provide answers in the shaded areas to all questions. Reference all attachments in the shaded area.

Business Proposal

2.3.1 General - Please introduce or summarize any information the Respondent deems relevant or important to the State's successful acquisition of the products and/or services requested in this RFP.

Panorama is tremendously excited to partner with the IDOE to deliver a comprehensive universal screening program for social-emotional learning (SEL). This program will address statewide needs in collecting social-emotional learning data, providing professional development on how to use the tool and how to interpret data, rolling out the screener statewide, and providing state-level data to the IDOE's Social, Emotional, and Behavioral Wellness team. Panorama will support the IDOE with a valid and reliable SEL screener, an online screener-taking and reporting platform, and comprehensive project management and professional development services to achieve the program goals stated in the RFP.

Panorama is the leading SEL screener provider for state departments of education, districts, and schools across the nation. Our clients include a dozen state agencies and over 1,500 school districts, serving more than ten million students annually. Panorama works directly with state agency clients in Alaska, Delaware, Hawaii, Indiana, Iowa, Rhode Island, New Hampshire, Texas, Utah, and Wyoming, in addition to working with the California Office to Reform Education (CORE Districts). Panorama proudly supports many Indiana clients as well, including Indianapolis Public Schools, Evansville Vanderburgh School Corporation, Hamilton Southeastern Schools, and MSD Lawrence Township.

We will build upon the successes of our pilot program with the IDOE, which encompassed successful measurement of SEL in students across topics like Self-Management, Self-Efficacy, and Sense of Belonging. Panorama also provided professional development for MTSS schools across the state and supported educators with taking action to support SEL at the district, school, and classroom levels.

Through the SEL screener program, we will expand upon our pilot work to roll out SEL measurement, reporting, and professional development statewide. The IDOE will gain access to SEL data to identify priorities in four core areas:

1. Student Competencies: The social, emotional, and motivational skills that help students excel in school, career, and life. (Example topics: Growth Mindset, Self-Efficacy, Social Awareness)

2. Student Supports and Environments: The environment in which students learn, which influences their academic success and social-emotional development. (Example topics: Teacher-Student Relationships, Sense of Belonging, School Safety)

3. Student Well-Being: Students' positive and challenging feelings, as well as how supported students feel through their relationships with others. (Example topics: Positive Feelings, Challenging Feelings, Supportive Relationships)

4. Teacher and Staff: Well-Being, Skills, and Capacity for SEL. The professional well-being and capacity of teachers and staff to support every student socially and emotionally. (Example topics: Well-Being, Professional Learning About SEL, Cultural Awareness and Action)

At the beginning of our partnership, Panorama's current project team for the IDOE will host a kickoff meeting with key IDOE staff to expand upon their vision for the SEL screener, identify key priorities and success criteria for our work together, and gather the necessary information to establish a clear project plan and timeline.

Panorama will then support the IDOE with conducting outreach to recruit and prepare the districts that will participate in the SEL screener program. We will work closely with the IDOE project team to develop a recruitment plan that is strategic and aligns to the vision and goals outlined in the kickoff meeting.

From there, the Panorama project team will partner with the IDOE to plan, design, and customize the Panorama SEL Screener. Panorama and the IDOE will review Panorama's library of valid and reliable social-emotional learning topics and select 5-8 topics on which to focus. Example topics include Self-Management, Social Awareness, Sense of Belonging, and Self-Efficacy. Students in grades 3-12 will take the Panorama SEL Screener online, on Panorama's website, which is accessible on most mobile devices and takes 10-15 minutes to complete.

After the screeners have been administered, results will be available through Panorama's interactive and easy-to-use reporting platform. Educators across the state will be able to delve into a wealth of SEL data and draw meaningful insights into how to take action to support students in SEL.

To complement our comprehensive reporting suite, Panorama will provide the IDOE with a professional development package that includes live trainings focused on data inquiry and action planning, along with on-demand resources and training, that will empower IDOE educators to provide targeted SEL supports.

Lastly, Panorama will bring the momentum and capacity to successfully roll out the Panorama SEL Screener program statewide. We have already delivered a successful MTSS pilot program for the IDOE and will build upon those successes. Implementing screener

programs at scale is Panorama's bread and butter, and we bring lessons learned from statewide partnerships like that with New York City and the California CORE districts. Our expertise in statewide screener programs, combined with the Panorama project team's insights from working with IDOE districts on the ground, convince us that our partnership will be extremely successful and will have a positive impact for students and student outcomes.

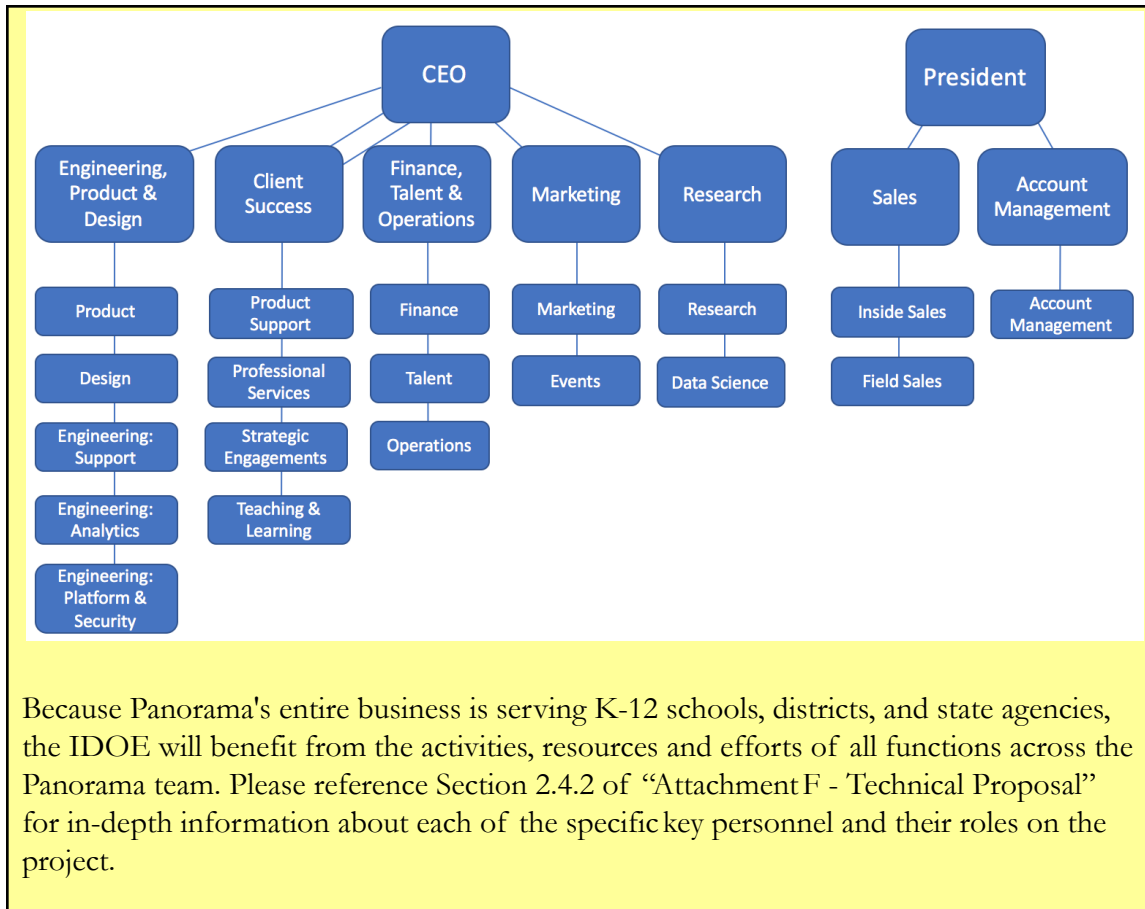
2.3.2 Respondent's Company Structure - Please include in this section the legal form of the Respondent's business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization. If the organization includes more than one (1) product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization. Please enter your response below and indicate if any attachments are included.

The legal form of Panorama Education, Inc.'s business organization is a C-corporation, formed in the state of Delaware. Please see the file titled "Business Proposal, Section 2.3.2 Attachment - Certificate of Authority" for a certificate of authority from Delaware.

Panorama's business ventures are exclusively in supporting K-12 schools, districts, and state agencies in improving student outcomes by driving action through critical data collection and reporting. Panorama is involved in stakeholder feedback and social-emotional learning survey administration and reporting, as well as supporting student success with a platform that displays academics, attendance, behavior, social-emotional learning data, and college and career readiness indicators all in one place, with a built-in toolset for progress monitoring and intervention tracking.

The Panorama Education team consists of product and visual designers, engineers, client relationship managers, technical support specialists, and researchers with expertise in survey design and K-12 education. Many of our 177 team members are former teachers, principals, and central office personnel.

We have two co-founders, who serve as our CEO and President. In addition, we are organized into seven main departments, as follows:



2.3.3 Company Financial Information - This section must include documents to demonstrate the Respondent’s financial stability. Examples of acceptable documents include: most recent Dunn & Bradstreet Business Report (preferred) or audited financial statements for the two (2) most recently completed fiscal years. If neither of these can be provided, explain why and include an income statement and balance sheet, for each of the two most recently completed fiscal years.

If the documents being provided by the Respondent are those of a parent or holding company, additional information should be provided for the entity/organization directly responding to this RFP. That additional information should explain the business relationship between the entities and demonstrate the financial stability of the entity/organization which is directly responding to this RFP.

Please see the file titled “[CONFIDENTIAL] Business Proposal, Section 2.3.3 Attachment - Financial Statements” for our financial statements per the above instructions.

2.3.4 Integrity of Company Structure and Financial Reporting - This section must include a statement indicating that the CEO and/or CFO, of the responding entity/organization, has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The

particular areas of interest to the State in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. The State will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

Please see the file titled “Business Proposal, Section 2.3.4 Attachment - CFO Statement” for a signed statement from our CFO taking personal responsibility for the thoroughness and correctness of the financial information supplied with this proposal.

2.3.5 Contract Terms/Clauses - Please provide the requested information in RFP Section 2.3.5.

We have reviewed Attachment B in detail, and we agree to all contract terms.

2.3.6 References - Reference information is captured on **ATTACHMENT X** [AGENCY SHOULD INSERT ANY DETAILS OR ADDITIONAL REFERENCE REQUIREMENTS INTO ATTACHMENT X FOLLOWING THE TEMPLATE FORMAT]. Respondent should complete the reference information portion of the **ATTACHMENT X** which includes the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information if the State elects to do so. The rest of **ATTACHMENT X** should be completed by the reference and either **mailed or emailed DIRECTLY** to the State. The State should receive [AGENCY INSERT NUMBER NEEDED] (#) **ATTACHMENT Xs** from clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. **ATTACHMENT X** should be submitted to idoareferences@idoa.in.gov or mailed to the address listed in section 1.8 of the RFP. **Attachment X** should be submitted no more than ten (10) business days after the proposal submission due date listed in Section 1.24 of the RFP. Please provide the customer information for each reference.

Customer 1	
Legal Name of Company or Governmental Entity	Indianapolis Public Schools
Company Mailing Address	120 E. Walnut Street
Company City, State, Zip	Indianapolis, IN 46204
Company Website Address	Myips.org
Contact Person	Shareyna Chang
Contact Title	Director of School Quality
Company Telephone Number	(757) 753-6139
Company Fax Number	
Contact E-mail	changs@myips.org

Industry of Company	Education
Customer 2	
Legal Name of Company or Governmental Entity	Hawaii State Department of Education
Company Mailing Address	637 18th Avenue, Room C-202
Company City, State, Zip	Honolulu, HI 96816
Company Website Address	Hawaiipublicschools.org
Contact Person	Morgan Yamamoto
Contact Title	Office of Strategy, Innovation and Performance
Company Telephone Number	(808) 733-4008
Company Fax Number	(808) 735-8260
Contact E-mail	Morgan.yamamoto@k12.hi.us
Industry of Company	Education
Customer 3	
Legal Name of Company or Governmental Entity	California CORE Districts
Company Mailing Address	1107 9th Street, Suite 500
Company City, State, Zip	Sacramento, CA 95814
Company Website Address	Coredistricts.com
Contact Person	Noah Bookman
Contact Title	Executive Director, CORE Data Collaborative
Company Telephone Number	(818) 661-8414
Company Fax Number	
Contact E-mail	noah@coredistricts.org
Industry of Company	Education

2.3.7 Registration to do Business - Selected out-of-state Respondents providing the products and/or services required by this RFP must be registered to do business within the State by the Indiana Secretary of State and the Indiana Department of Administration, Procurement Division. The address contact information for this office may be found in Section 1.18 of the RFP. This process must be concluded prior to contract negotiations with the State. It is the successful Respondent's responsibility to complete the required registration with the Secretary of State. Please indicate the status of registration, if applicable. Please clearly state if you are registered and if not provide an explanation.

Panorama Education, Inc., as an out-of-state corporation, is registered to do business within Indiana by the Indiana Office of the Secretary of State. For reference, our Business ID is 201801241235794.

Additionally, Panorama Education, Inc. is registered with the Indiana Department of Administration, Procurement Division, through the on-line Bidder Database.

2.3.8 Authorizing Document - Respondent personnel signing the Transmittal Letter of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement. Please enter your response below and indicate if any attachments are included.

Please see the file titled "Business Proposal, Section 2.3.8 Attachment - Corporate Bylaws" for a letter from our bylaws that detail authority for signing contracts. Alexander Tanner has signed the Transmittal Letter and has authority to commit the organization contractually as Secretary of Panorama Education's Board of Director.

2.3.9 Subcontractors - The Respondent is responsible for the performance of any obligations that may result from this RFP, and shall not be relieved by the non-performance of any subcontractor. Any Respondent's proposal must identify all subcontractors and describe the contractual relationship between the Respondent and each subcontractor. Either a copy of the executed subcontract or a letter of agreement over the official signature of the firms involved must accompany each proposal.

Any subcontracts entered into by the Respondent must be in compliance with all State statutes, and will be subject to the provisions thereof. For each portion of the proposed products and services to be provided by a subcontractor, the technical proposal must include the identification of the functions to be provided by the subcontractor and the subcontractor's related qualifications and experience. The combined qualifications and experience of the Respondent and any or all subcontractors will be considered in the State's evaluation. The Respondent must furnish information to the State as to the amount of the subcontract, the qualifications of the subcontractor for guaranteeing performance, and any other data that may be required by the State. All subcontracts held by the Respondent must be made available upon request for inspection and examination by appropriate State officials, and such relationships must meet with the approval of the State.

The Respondent must list any subcontractor's name, address, and the state in which formed that are proposed to be used in providing the required products and/or services. The subcontractor's responsibilities under the proposal, anticipated dollar amount for subcontract, form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Respondent of any responsibilities in responding to this RFP or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority Business Enterprises or Women's Business Enterprises under IC 4-13-16.5-1. See Section 1.21 and Attachment A for Minority and Women's Business Enterprises information. Please enter your response below and indicate if any attachments are included.

No subcontractors will be used in the performance of the obligations resulting from this RFP. We have completed "Attachment A - Minority and Women Business Commitment Form" with "N/A - No subcontractors will be used" and have included it in our response.

2.3.10 Evidence of Financial Responsibility- This section will indicate the ability to provide the mandatory evidence of financial responsibility. See Section 1.25 of RFP for details.

Reserved.

2.3.11 General Information - Each Respondent must enter your company's general information including contact information.

Business Information	
Legal Name of Company	Panorama Education, Inc.
Contact Name	Jillian Evans
Contact Title	Account Director, Indiana
Contact E-mail Address	jevans@panoramaed.com
Company Mailing Address	24 School Street, Fourth Floor
Company City, State, Zip	Boston, MA 02108
Company Telephone Number	(617) 356-8123
Company Fax Number	(617) 841-7647
Company Website Address	https://www.panoramaed.com/
Federal Tax Identification Number (FTIN)	90-0995958
Number of Employees (company)	177
Years of Experience	Eight years
Number of U.S. Offices	Two
Year Indiana Office Established (if applicable)	N/A
Parent Company (if applicable)	N/A
Revenues (\$MM, previous year)	\$17,656,100.46
Revenues (\$MM, 2 years prior)	\$10,541,812.66
% Of Revenue from Indiana customers	2.57%

- a. Does your Company have a formal disaster recovery plan? Please provide a yes/no response. If no, please provide an explanation of any alternative solution your company has to offer. If yes, please note and include as an attachment.

Yes, Panorama has a formal disaster recovery plan. Please see "Business Proposal, Section 2.3.11 Attachment - Disaster Recovery Plan."

- b. What is your company's technology and process for securing any State information that is maintained within your company?

Panorama's technology is a comprehensive screener administration and reporting platform through which students complete the SEL screener and results are analyzed and reported for educators through interactive dashboards and data visualizations. The platform is entirely web-based and fully functional on recent versions of internet browsers. The platform will be fully accessible through all major web browsers, including recent versions of Chrome, Firefox, Safari, and Edge.

In order to produce confidential screeners that allow for meaningful analyses of school, district, respondent subgroup, and other demographic factors, Panorama will work with the IDOE's data team to securely transfer the necessary data from the IDOE's data system/s to Panorama prior to the screener launch through our secure file sharing tool. We have worked with the IDOE team many times in the past to perform data transfers, and the IDOE already uses Panorama's secure file sharing tool. Several other state-level clients like the Rhode Island Department of Education and the Wyoming Department of Education use Panorama's secure file sharing tool as well.

The recommended process for SFTP transfer with the IDOE will likely include:

- Panorama provides the IDOE with a data file template that includes all required and optional roster data fields necessary to properly conduct the district climate survey
- IDOE populates the data file with the appropriate roster data
- The IDOE uploads the file to Panorama's SFTP site (using credentials provided to the IDOE over the phone)
- Panorama downloads the files
- Panorama validates the files and resolves any questions with IDOE staff
- Panorama will plan to delete the files uploaded once they have been reviewed and validated

After all data has been validated, the Panorama team will properly configure, prepare, and produce all screeners and accompanying materials, complete all necessary quality assurance processes, and deliver all survey materials to the IDOE according to the established timeline and specifications. Panorama pays special attention to making sure that all screener materials are delivered according to state and district specifications. Panorama will also perform a thorough data file validation check, including detailing summary counts of teachers, schools, grade levels, and demographics, providing validation of any school information that has changed since the previous administration.

Data Security

Protecting the integrity of respondent data – especially student information – is critical in

any screener program. Panorama has rigorous security practices in place to protect the millions of student records and other respondent data that we securely manage.

Panorama's technology infrastructure includes SSL/TLS encryption for all data in and out of the platform, multi-factor authentication for all Panorama staff, and at-rest data encryption. Panorama also adheres to a strict data privacy policy and provides data privacy training for all staff. Panorama's server hardware is protected via safeguards such as firewalls and physical access controls. Panorama's services team likewise follows rigorous security processes and protocols designed to keep data confidential and secure. The platform uses strict data access rules via "principle of least privilege" to provide in-platform data access to IDOE staff. Panorama will work with the IDOE to set clear protocols for who can manage and access which sets of data. For example, can teachers see principal reports? Can principals see screener participation rates at their school? These decisions are best made by state or district leadership, depending on the context and goals of a particular screener administration. Panorama has the ability to set permissions based on the IDOE's desires.

2.3.12 Experience Serving State Governments - Please provide a brief description of your company's experience in serving state governments and/or quasi-governmental accounts.

Panorama's clients include a dozen state agencies, including the IDOE, as well as the California CORE districts. We've outlined a selection of these partnerships below:

- **Association of Alaska School Boards (AASB)** Since 2016, Panorama has partnered with AASB to implement climate surveys statewide for students, teachers, and staff. Panorama manages the planning, administration, reporting, and training associated with AASB's custom instrument, the School Climate and Connectedness Survey (SCCS). Approximately 35 districts and 330 schools across Alaska have the flexibility to choose two-week long windows in which to administer surveys under the umbrella of a longer screener window chosen by AASB. Panorama also managed the integration of historical data associated with SCCS so that educators have access to robust change-over-time data.
- **Arizona Department of Education (ADE):** ADE is using Panorama's platform to gather student voice data around the following themes: social-emotional learning, equity and cultural awareness, and school climate in alignment with the goals of the state's ELEVATE program. This is an evidence-based, executive leadership program centered around equity to develop the knowledge, competencies, and skills necessary for systematic and systemic change by strengthening the culture of learning and high expectations for all, instructional infrastructure, and talent management at the systems level within LEAs and schools. Panorama will support ADE and the 9 participating LEAs in administering student screeners within participating schools and in viewing actionable results at the state, LEA, school, and for some topics, student-level. After data is collected, Panorama

will support ELEVATE cohort leaders and representatives from each LEA in train-the-trainer workshops to support each participating school in building strong systems around data inquiry and incorporating student voice in improvement planning.

• **CORE Districts (California Office to Reform Education):** Since 2014, Panorama has partnered with CORE (a consortium of California districts) to manage student, parent, and teacher survey programs in four large urban California districts: San Francisco Unified, Fresno Unified, Long Beach Unified, and Santa Ana Unified. For this project, Panorama supports survey implementation online and on paper for more than 300,000 students, parents, and staff members, in 10 languages, across 450 campuses. Panorama also provides reporting and analysis directly to every participating school and district within CORE. Teachers, principals, district leaders, and school board members across the state are using Panorama for school improvement, program evaluation, and professional learning.

As part of our partnership with CORE, Panorama measures and reports student SEL skills and competencies to drive impact in schools based on SEL data. An example of Panorama's impact on SEL at Long Beach Unified was featured in an EdWeek webinar, "Using Data to Support Students' SEL." The webinar explores how the leadership team of one school in Long Beach Unified, after seeing students' low perceptions of "Growth Mindset," set and achieved goals to implement targeted SEL supports, to increase students' perceptions of "Growth Mindset" along with SEL competencies as a whole, and to use data as a continuous monitor of student progress in SEL.

• **Hawaii Department of Education (HIDOE):** Since 2017, the Hawaii Department of Education has partnered with Panorama Education to implement Panorama Student Success, our MTSS and early warning system, across twenty schools in the Mililani, Leilehua and Waialua complexes of the statewide district. As part of the Department's project, each school uses Panorama to understand and support the needs of each student. Educators use Panorama to administer social-emotional learning (SEL) screeners, monitor trends in attendance, grades and assessments, and track the progress of key student demographic groups (e.g. FRPL, 504, gender, grade level, etc.). Student support teams at these schools use Panorama to quickly see where students are falling off track, respond with appropriate interventions, and track specified groups over time. Many of the schools have high populations of military-connected families and use the tools to quickly understand and intervene with new students in these and other highly transitory populations.

• **Indiana Department of Education (IDOE):** Since 2018, the IDOE has partnered with Panorama to measure school climate in all CSI schools across the state. In this project, nearly 157 schools across 75 districts in the state ask students, staff, and families to share their perception on school climate. School leaders then use this data to set goals for the following year within their site's comprehensive needs assessment.

In the 2019-20 school year, Panorama also partnered with the MTSS pilot schools. In collaboration with Panorama, the MTSS pilot schools built an SEL screener that is aligned to the IDOE's standards and is custom to the needs of Indiana districts. These 11 schools distributed the screener to all students in February 2020 and then participated in one-on-one data coaching during March 2020. After all data coaching and training sessions, the Panorama team created a synthesis of our findings across our pilot and presented recommendations about how to best move forward with replicating the success of the model with other Indiana schools and districts.

Additionally, when schools transitioned to remote learning in Spring 2020 in light of COVID-19 pandemic, the IDOE and Panorama continued to work together to measure distance learning effectiveness for LEAs across the state. Nearly 25,000 staff and family members from over 70 Indiana districts participated in the survey to share valuable reflections on their distance learning experience as well as preferences for returning to school in the fall. District administrators were then able to use the Panorama platform to see how they can improve the educational experience when reopening schools in Fall 2020.

Prior to the school climate and MTSS pilot programs, the IDOE and Panorama partnered together to administer a statewide Educator Survey. Panorama worked with the IDOE and the nine Education Service Centers across the state of Indiana to deliver regionally-based data inquiry and action planning workshops for educators who participated in the Your Voice Matters survey program. Panorama supplemented these trainings with a dedicated online hub of resources and supports for schools and districts to help guide school and district leaders in viewing their educator survey results.

• **Iowa Department of Education:** The Iowa DOE is partnering with Panorama in order to bring greater consistency to its MTSS practices. With a single system for collecting and reporting on student data, educators take a unified approach to universal screening reporting, intervention assignment, and progress monitoring, and administrators will gain greater insight into the statewide health of its MTSS practices. The initial implementation centered on supporting Iowa's focus on early literacy, building upon state legislation to have all students literate by third grade. Panorama supports this effort by integrating and reporting on K-6 students' ELA assessment data from FAST and other assessment providers. Going forward, the MTSS Data System will also streamline the state's data reporting across additional assessments, coursework, attendance, and SEBMH (social emotional, behavior, mental health), helping the state to more fully realize its commitment to Whole Child support. In addition to supporting the Iowa DOE with an MTSS Data System, Panorama administers the Conditions for Learning survey on the Panorama platform for students in grades 3-12, providing districts across the state with critical data on school climate.

• **Kentucky Department of Education (KDE)** Panorama works with the Kentucky Department of Education to administer a Climate and Working Conditions Survey to all school-based staff in the state. Historically, the survey boasted the highest state-wide

teacher/staff response rates in the country, and Panorama has boosted response rates even higher since taking over the project in 2019. In addition to providing fundamental data to support schools in understanding working conditions and supporting school improvement, Panorama also supports focused professional development sessions for users across the state. These sessions both support users in navigating the platform and to drive key insights in key topic areas such as "Educating All Students."

- **Nevada Department of Education (NDE):** Panorama partners with NDE to measure Adult SEL through the administration of a pre- and post-assessment of district and school staff across the state who are taking part in a social and emotional academic development diagnostic. The state uses results to inform its programming and provide professional development and learning opportunities for educators across the state. Many of the educators participating in the NDE program work in Clark and Washoe county schools, the two largest school systems in the state.

- **Rhode Island Department of Education (RIDE):** Since the 2015-2016 school year, Panorama has partnered with RIDE to implement statewide climate surveys across students, teachers, staff, and parents. Panorama runs a comprehensive survey program for the state—managing stakeholder outreach, survey design, planning, administration, reporting, and training—for over 100,000 respondents. RIDE uses Panorama-developed survey instruments and supplements this content with customized items so that key community partners such as parent groups and teacher unions are represented. Panorama interfaces with state department program staff, statewide stakeholder groups, and site-based leadership in order to build buy-in for the surveys program.

Administrations are run concurrently, and family surveys are administered both online and on paper. Panorama provides reporting at the state, district, and school levels, and develops customized analytics and reporting to meet state and federal accountability requirements. The IDOE can explore RIDE's public reports at:

<http://www.ride.ri.gov/InformationAccountability/RIEducationData/SurveyWorks.aspx>

- **Texas Education Agency (TEA):** Panorama has partnered with the Texas Education Agency for the past two years to administer student, staff, and family climate surveys for all comprehensive schools across the state of Texas. Campuses in Texas participate in the program each fall and receive results to inform their campus improvement planning and support their comprehensive diagnostic process. Panorama delivers professional learning sessions and school-based consultations to campuses to help identify areas of focus and set campus-based goals for improvement. Panorama also runs an opt-in process across the state, allowing any school to participate in the survey program, regardless of whether they are identified as needing comprehensive supports.

- **Utah State Board of Education (USBE):** The Utah State Board of Education has implemented a state-level pilot of Panorama Student Success to help LEAs leverage data across academics, attendance, behavior, and Social-Emotional Learning as a

comprehensive early warning system for students in need of early intervention. Panorama Student Success is used to enhance the Student Backpack data tool, part of the State's effort to share the learning profile of individual students in grades K-12, and to provide additional formative actionable data on student outcomes. Several districts across the state are participating, including Ogden, Provo, and Box Elder. The State looks at the impact of the tool across a set of schools as part of its exploration of new ways to identify at-risk students and effectively intervene.

- **Wyoming Department of Education (WDE):** Since 2016, the Wyoming Department of Education has partnered with Panorama to administer student climate screeners to traditional and alternative high school students across the state. The State plans to use data from the screener administration as baseline data to inform the viability of using the climate screener as part of the broader statewide accountability system and as a non-academic indicator that meets the requirements of the Every Student Succeeds Act (ESSA).

2.3.13 Experience Serving Similar Clients - Please describe your company's experience in serving customers of a similar size to the State with similar scope. Please provide specific clients and detailed examples.

Panorama has over 1,500 district clients, including several districts in Indiana, in addition to many large districts across the country. We have included a select list here:

- **Charlotte-Mecklenburg Schools (NC):** Panorama has partnered with CMS since 2018 to measure SEL skills and competencies in students across the district. After an SEL pilot program that began in Spring of 2018, CMS expanded to full-district SEL measurement and reporting. Panorama partners with CMS to design and administer the district's SEL Universal Screener, with all schools participating in the screener program. Panorama is also supporting CMS with training for all school and district staff, as well as individual school consultations to help codify direct action planning from SEL data. In addition to supporting students at an individual level, CMS has implemented SEL data directly into their school improvement planning for schools, and into their vision for student equity.

- **Evansville Vanderburgh School Corporation (IN):** Panorama has partnered with EVSC for a one-year pilot to measure social-emotional learning with students and teachers. This data will serve as the baseline for their five year continuous improvement plan, "Maximizing Potential: Blueprint for Student Success," which is rooted in brain research about stress. Panorama runs a comprehensive survey program from the district-managing stakeholder outreach, survey design, planning, administration, reporting, and training – for over 7,000 respondents. EVSC utilizes Panorama's research-backed survey items to collect data from students about their perception of their own social-emotional competencies and overall school climate. Additionally, EVSC surveys teachers to reflect on students' social-emotional competencies who are too young to take the survey (those

in grades k-2), and surveys teachers to learn more about what additional supports are needed at the school sites to effectively build strong school climate. Panorama also facilitated a "train the trainer" workshop to equip their student services team with data inquiry protocols to better understand the data. EVSC surveys their students three times a year and their staff twice.

- **Hamilton Southeastern Schools (IN):** Hamilton Southeastern Schools (HSE) partners with Panorama to administer SEL surveys to students, as well as surveys to gather families' perceptions of their relationships with their schools. The surveys are part of HSE's district-wide Equity efforts, and have provided the district with key baseline information surrounding all students' perceptions of both environmental and climate indicators, as well as individual SEL competencies. Panorama has led professional development with HSE to continue training both district and school leaders to continue building this work at the school and student levels.

- **Houston ISD (TX):** HISD has been working with school staff to incorporate SEL core competencies into lesson plans and day-to-day interactions with students, and this year will begin to measure the impact of this work by collecting student and staff social emotional learning perceptions. This survey will be administered to more than 200,000 students to elevate their voices and experiences, and allow district and school leaders to take meaningful and direct action to improve practices across the district. Teachers and staff will also have the opportunity to share their perceptions of school climate, their readiness to support student SEL, and their experience with professional learning opportunities. HISD knows that excellent support for students starts with excellent support for adults, and is eager to use both sets of data to ensure they are on the right track.

- **Indianapolis Public Schools (IN):** IPS partners with Panorama to administer stakeholder surveys for teachers, students, and families. The surveys are part of IPS's school performance framework as a key indicator of each school's culture/climate and measure the most important dimensions of a school environment. Panorama has worked with the district to customize a stakeholder survey instrument for each respondent group using a combination of Panorama's research-backed survey instruments and custom questions. Stakeholder feedback is used to support IPS's goals of developing a new strategic plan and improving outcomes for all students by eliminating racial disproportionality and disparity.

- **New York City Department of Education (NYCDOE)** Although not a statewide project, our work with NYCDOE is larger than most statewide programs. For five years, Panorama has managed NYCDOE's Student Perception Survey—the largest student feedback survey in the country. The partnership with NYCDOE includes survey design, survey production, distribution logistics, survey administration, reporting and analysis, and stakeholder engagement. Panorama has worked with NYCDOE to customize the Panorama Student Survey for use in the district, administering more than 1.9 million surveys annually, in 10 NYCDOE languages, on paper and online. At the conclusion of

each administration window, Panorama provides teachers, principals, and district staff with easy-to-read survey results, delivers professional development training and resources designed to increase usage and engagement, and generates raw data exports for NYCDOE's use. Through this program, 27,000 teachers are able to take action based on student voice data.

• **Orange County Public Schools (FL):** Orange County began its partnership with Panorama as a small pilot in 2018, and expanded to district-wide SEL measurement for students and staff in the 2019-20 school year. OCPS's new 2025 Strategic Plan includes key goals around areas of school climate and social emotional learning, and Panorama's research-backed instruments are key measurement tools for these long-term goals. District Teaching & Learning staff, Area Superintendents and Principals have all participated in customized trainings to help them understand the staff and student perception data, and take direct action to plan PD, allocate support and resources, and plan interventions at the school level. In the 2020-21 school year, OCPS will more frequently measure student perceptions of climate and SEL to ensure school leaders have all the information they need to support their students in this uncertain time.

2.3.14 Indiana Preferences - Pursuant to IC 5-22-15-7, Respondent may claim only one (1) preference. For the purposes of this RFP, this limitation to claiming one (1) preference applies to Respondent's ability to claim eligibility for Buy Indiana points. **Respondent must clearly indicate which preference(s) they intend to claim. Additionally, the Respondent's Buy Indiana status must be finalized when the RFP response is submitted to the State.**

Additionally, Respondents that wish to claim the Buy Indiana preference (for any criteria listed below) must have an email confirmation of their Buy Indiana status provided by buyindianainvest@idoa.in.gov included in the proposal response. The email confirmation must have been provided from within one year prior to the proposal due date.

Buy Indiana

Refer to Section 2.7 for additional information.

2.3.15 Payment - Please provide the requested information in RFP Section 2.3.15.

Reserved.