



TO: Prospective Offerors

DATE: June 17, 2026

SUBJECT: **Request for Qualifications - Financial Literacy, Grade 12 - RFQ-2026-04**

You are invited to submit information for Visalia Unified School District's Financial Literacy, Grade 12 curriculum pilot. Visalia Unified School District is a public school district located in Tulare County, California.

Attached are the general conditions, technical specifications, and submittal format. This RFQ information is also located on the district's webpage: vusd.org/Departments/Teaching&Learning/Request of Qualifications.

The written requirements contained in this Request for Qualifications (RFQ) shall not be changed or superseded except by written notice from Visalia Unified School District. Failure to comply with the written requirements for this RFQ may result in disqualification of the offeror from proposal events related to this solicitation.

It shall be the responsibility of the offeror to meet all specifications and guidelines set forth herein, in addition to all applicable laws and regulations. Visalia Unified School District, at its discretion, determines the proposals deemed acceptable for further consideration. No damages shall be recoverable by any challenger as a result of these determinations or decisions.

Visalia Unified School District will leverage electronic communication to administer this RFQ and all offeror responses must be submitted electronically in accordance with the instructions contained in Section 1.B.2 "Submission Instructions".

Your interest and participation in the Visalia Unified School District's solicitation process is appreciated.

Sincerely,

A handwritten signature in blue ink that reads "Mike DeRosa".

Mike DeRosa, Literacy & Social Science Coordinator
Teaching and Learning Department
Visalia Unified School District
5000 West Cypress Avenue
Visalia, CA 93277



**SOLICITATION NO. RFQ-2026-04
REQUEST FOR QUALIFICATIONS**

FOR

Financial Literacy, Grade 12

Opening: June 17, 2026 at 12:00p.m. PST

Closing: July 17, 2026 at 12:00p.m. PST

This cover sheet must be signed and submitted to be considered for offeror information. Required addenda are defined within this document. It is the responsibility of the offeror to ensure that they review and submit all applicable addenda with their solicitation. Offerors should not expect to be individually notified.

Company name:		Date:	
Mailing Address:		Phone:	
City:		Fax:	
State:	Zip:	SSN or Federal Tax ID:	
Email:		Title of Authorized Representative:	
Printed Name:		Authorized Signature:	

SECTION I - REQUEST FOR INFORMATION OVERVIEW

A. PURPOSE

This Request for Qualifications ("RFQ") is intended to identify one or more responsible vendors who meet or exceed the base requirements identified within this document. This RFQ will not result in a contract award. Instead, this RFQ will establish a list of one or more qualified vendors who will be eligible to participate to win future contracts from VUSD. Within this document, the terms Respondent, Offeror, Vendor, and/or Contractor are synonymous and refer to the person, entity or firm that submits a response to this RFQ.

B. INFORMATION TO OFFERORS

1. RFQ OVERVIEW AND TIMETABLE

The RFQ is an informational process intended to identify one or more responsible vendors who can supply the requested information to provide the goods and/or services outlined in this RFQ. All interested vendors are invited to participate by submitting responses, as further defined below. For general informational purposes, dates below are prospective and may be subject to change. Any such change will be communicated electronically and shall be made at least 48 hours prior to the event beginning. This RFQ information is also located on the district's webpage: vusd.org/Departments/Teaching&Learning/Request of Qualifications.

Event	Timing
Release of RFQ	6/17/2026 at 12:00p.m. PST
Deadline for Questions	6/26/2026 at 12:00 p.m. PST
Responses to Questions Communicated	6/30/2026 at 12:00 p.m. PST
RFQ Submission Deadline	7/17/2026 at 12:00 p.m. PST
Evaluation Period	7/18/2026 - 5/31/2027
Notification to all Vendors	8/1/2026 - 6/30/2027
Recommendation to the Board	Winter/Spring 2027

2. SUBMISSION INSTRUCTIONS

All offerors who desire to respond to this solicitation must submit qualification packets and attached exhibits as outlined in Section 1.B.2.a below, "RFQ Submission Checklist." All submissions must be submitted electronically with those items highlighted in yellow on the checklist required as print submissions. Required print material must be sealed, marked with the proposal number and title, and delivered to Mike DeRosa, Literacy & Social Science Coordinator, Teaching and Learning Department, Visalia Unified School District, located at 5000 W. Cypress Ave., Visalia, CA 93277. Electronic components of qualification packets must be emailed to Mike DeRosa, mderosa@vusd.us. It is the responsibility of the offeror to ensure a complete submission with both the print and electronic submissions having been received well before the established deadline date and time. Qualification packets received later than the established deadline date and time will not be accepted.

a) RFQ SUBMISSION CHECKLIST

The following components constitute a complete submission:

Requested Information Category	Required Document
Cover Sheet	Signed RFQ Cover Sheet
Licensing	Affirmative response and evidence of appropriate licensure
Insurance	Certificate of Liability Insurance Naming Visalia Unified School District as Additional Insured at the specified minimal amounts (Example)
Required Addenda	A – Signed “Execution of Proposal”
Required Addenda	B – Signed Completed “Offeror Information” Form
Required Addenda	C – Signed “Certification of Non-Collusion”
Required Addenda	D – Signed “Certification of Non-Discrimination”
Required Addenda	E – Signed “Addendum Acknowledgement”
Print Required with Submission	Eight complete teacher and student samples of each submitted product. Both the print and digital components must be submitted if both print and digital options are available. For any digital submissions, please provide login credentials that multiple users can use simultaneously.
Print Required if Selected to Pilot	For programs with a print component: Eight complete teacher and student print sets of materials. The eight samples provided at the time of submission will suffice if they are comprehensive of the print component. For programs with a digital component: Eight teacher digital accounts/licenses. Continued use of the eight digital teacher accounts/licenses provided at the time of submission will suffice if they are comprehensive of the digital component. Student digital accounts/licenses must be provided 1:1 for the purpose of piloting with the exact number of student digital accounts/licenses to be determined prior to the scheduled pilot teacher training.

b) SUBMITTING QUESTIONS

All questions concerning this RFQ must be submitted electronically to Mike DeRosa, Literacy & Social Science Coordinator, mderosa@vusd.us, for “Opportunity Q&A”. No questions other than those written and submitted electronically will be accepted. No response other than those written and communicated electronically will be binding upon the Visalia Unified School District. All offerors must submit questions by the deadline identified in the RFQ TIMETABLE above for

submitting questions. Offerors are advised that Visalia Unified School District may or may not respond to late questions.

c) AUTHORIZED PARTY

The table on the cover sheet to this RFQ shall be completed and signed by the offeror. The coversheet to the submittal must be signed by a company officer who is legally authorized to enter into a contractual relationship in the name of the submitting firm.

3. ISSUING PARTY DETAILS

The solicitation lead is Mike DeRosa, Literacy & Social Science Coordinator, Teaching & Learning, Visalia Unified School District. **Any question(s) which arise must be submitted via email to mderosa@vusd.us** by the deadline identified in the RFQ TIMETABLE above for submitting questions.

4. ADDITIONAL INFORMATION/ADDENDA

Visalia Unified School District will issue responses to submitted questions, inquiries and any other corrections or amendments it deems necessary in written addenda issued prior to the submission deadline. Offerors should not rely on any representations, statements or explanations other than those made in this RFQ (which shall include any addendum). Where there appears to be a conflict between the RFQ and any addendum issued, the last addendum issued will prevail.

Responses which fail to acknowledge the offeror's receipt of any addendum may result in the rejection of the offer or result in the disqualification of the prospective offeror's submittal.

Offerors are not to include brochures, flyers, screenshots, or the like in the submission, but any supporting document(s) such as program elaboration guides may be included in the electronic submission component. A table of contents should be included to reference each document and index it to the corresponding topic and question.

5. LATE SUBMITTAL, LATE MODIFICATIONS AND LATE WITHDRAWALS

Submittals received after the due date and time **will not** be considered. Modifications received after the due date **will not** be considered.

C. GENERAL PROCUREMENT INSTRUCTIONS

1. Visalia Unified School District is governed by the Tulare County Board of Education and is a recognized governmental entity. The Visalia Unified School District Purchasing Policy (Board Policy DJE) is incorporated into this solicitation in Section 2.E "Addenda" by reference. By participating in this solicitation an offeror agrees to be bound by the Visalia Unified School District Purchasing Policy on any issue or action related to this solicitation or subsequent contract resulting from this solicitation.
2. Visalia Unified School District must receive all submittals no later than the date and time listed in this RFQ. Each offer must be signed and dated by an official authorized to bind the firm. Late submissions will not be considered for award.
3. Information requested must be submitted in the templates and/or format prescribed in the instructions. Submittals will be reviewed according to completeness, content, experience with similar projects, ability of offeror and any hired staff.
4. Offerors are cautioned that this is a request for qualification and not a request to contract. Visalia Unified School District reserves the right to disqualify any and all offerors when deemed to be in the best interest of Visalia Unified School District.
5. Any costs incurred by an offeror in preparing a response to this RFQ is the offeror's sole responsibility; Visalia Unified School District will not reimburse any offeror for any costs incurred.
6. Requested information must be submitted in accordance with the requirements of the RFQ. Failure to include any required information may cause disqualification.
7. By submitting a response, the offeror represents and warrants no official or employee of Visalia Unified School District has, in any manner, an interest, directly or indirectly in the offer or in any contract which may be made as a result of qualifying for this RFQ, or in any expected profits to arise therefrom. The offeror is required to disclose any real or apparent conflict of interest with any Visalia Unified School District officials or employees at the time of submission.

SECTION II – GENERAL CONDITIONS

A. PURPOSE

Visalia Unified School District is seeking to acquire resources to support instruction aligned with California Senate Bill 1147 and California Assembly Bill 2927. In brief, these Bills state Local Education Agencies will offer a Personal Finance course beginning in the 2027-28 school year that will subsequently become a graduation requirement beginning with the class of 2030-31. Visalia Unified School District is actively preparing to offer this course in grade twelve under the name Financial

Literacy and is soliciting information from vendors interested in providing curriculum that includes the course's thirteen required topics.

CURRENT STATE

Visalia Unified School District is responsible for educating more than 32,000 students in a diverse, constantly changing and growing suburban environment. Our vision is *Every Student Empowered to Achieve Future Success*. Our mission is *Every Student Learning Every Day*. Our Strategic Plan calls for us to "Create a community of powerful readers and writers." Visalia Unified School District has 41 schools that break down as follows:

- Elementary Schools – 27 (Two elementary schools also implement Spanish dual immersion programs and three elementary schools also implement Newcomer programs)
- Middle Schools – 5 (One middle school implements a Newcomer program)
- High Schools – 5 (Three high schools implement Newcomer programs)
- Other - 4

Visalia Unified School District has not adopted any curriculum for this course. This course, Financial Literacy, will be a new offering beginning in the 2027-28 school year.

As part of its curriculum selection process and within the evaluation period specified in the RFQ Overview and Timetable in Section I.B.1 above, Visalia Unified School District will include a review of the materials/resources listed as appendixes on the California Department of Education's Personal Finance webpage.

Visalia Unified School District has adopted the following curriculum for a similar course currently offered called Math for Personal Finance.

- Mathematics for Personal and Business Finance, Glencoe McGraw Hill (2016)
- Foundations in Personal Finance High School Edition, Lamo Licensing (2014)

Math for Personal Finance does not meet the requirements of California Senate Bill 1147 and California Assembly Bill 2927 and will be phased out once the new course, Financial Literacy, becomes a graduation requirement.

SCOPE OF WORK FOR DESIRED STATE

- The proposed solution must comprehensively address all thirteen course topics, all clearly defined learning outcomes, and all aligned standards as outlined on the California Department of Education's Personal Finance webpage and its accompanying Personal Finance Curriculum Guide.
- Include a balance of print and digital learning materials. Digital learning materials must meet these criteria:
 - Digital learning materials are device agnostic and conform to IMS Global standardization.
 - Digital learning materials support integration with other Systems or 3rd party software with accessibility either through Clever or Schoology LMS. (i.e. supports open standards, including Learning Tools Interoperability LTI® standards.)
 - Digital learning materials allow for Single Sign On (SSO) through Active Directory (AD), Lightweight Directory Access Protocol (LDAP), and Open Application Program Interface (API) compliance. Google SSO is preferred.
 - Digital learning materials contain content that is current and updated in a timely manner.
 - Provider shares digital learning materials' guest login access with the District for both teachers and students for all web based and digital products.
- Contain teacher-ready online and print resources for lesson implementation that differentiates for learners.

Scope of Procurement (Estimated)

- Approximately 800 Student Print Editions
- Approximately 20 Teacher Editions
- Approximately 2000 Student Digital Licenses

B. OFFEROR INFORMATION/QUALIFICATIONS

All of the specifications, requirements and/or service levels identified in this RFQ are minimum performance criteria and factors that VUSD will use to identify capable vendors. Each vendor must indicate its willingness and ability to satisfy these requirements in the appropriate template provided.

1. SCOPE OF WORK ACKNOWLEDGEMENT FORM

Any agreement with vendors qualified in this RFQ will entail the following at minimum:

- Support for a review of the product from July 18, 2026 - May 31, 2027. Review to include both print and digital product samples as specified in Section 1.B.2.a, "RFQ SUBMISSION CHECKLIST."
- Vendors are required to establish and maintain a digital platform that is accessible for stakeholder review from July 18, 2026 - May 31, 2027.

2. ADMINISTRATIVE REVIEW

Submittals will be reviewed by the Issuing Party or their designee to determine compliance with the following requirements:

- Response was submitted by the deadline defined in Section I.B.1 titled "RFQ OVERVIEW AND TIMETABLE"
- Response is complete and contains all required documents defined in Section I.B.2.a titled "RFQ SUBMISSION CHECKLIST"

C. ADDENDA

The following is a summary of all required and informational addenda included in this RFQ. All addenda must be acknowledged by the offeror to submit a response to this RFQ.

Addendum Reference	Addendum Title	Addendum Category
A	Signed Execution Proposal of Information	Required with submittal
B	Offeror Information	Required with submittal
C	Certification of Non-Collusion	Required with submittal
D	Certification of Non-Discrimination	Required with submittal
E	Addenda Acknowledgement	Required with submittal

EXHIBIT A EXECUTION OF PROPOSAL

DATE: _____

The potential offeror certifies the following by placing an "X" in all blank spaces:

_____ That this proposal was signed by an authorized representative of the firm.

_____ That the potential offeror agrees to the conditions as set forth in this **Request for Information** with no exceptions.

Authorized Signature

Date

Typed Name & Title

THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL.

EXHIBIT B

OFFEROR INFORMATION FORM

Mailing Address (Please type or print. Complete all items)

Business Name: _____
Address: _____
City, State, Zip: _____
Phone: _____ Fax: _____ Email: _____

Remittance Address (if different)

Business Name: _____
Address: _____
City, State, Zip: _____
Phone: _____ Fax: _____ Email: _____

Accepted Payment Methods (select all that apply)

☐ Check ☐ Credit Card/Purchase Card ☐ ACH ☐ Other: _____

Other Offeror Information

Federal Business ID: _____ or Social Security # _____

Certification

Under penalty of perjury, I certify that:

1. The information stated in this application is factual and true, **and**
2. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), **and**
3. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding.

Certification Instructions: You must cross out Item 3 above if you have been notified by the IRS that you are currently subject to backup withholding because of under reporting interest or dividends on your tax return. For real estate transactions, Item 3 does not apply. For mortgage interest paid, the acquisition or abandonment of secured property, contributions to an individual retirement account (IRA), and generally payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN.

(Representative's Signature) Date

Please type or print representative's name

THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL.

EXHIBIT C

CERTIFICATION OF NON-COLLUSION

I certify that this Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Proposal for the same materials, supplies, or equipment.

I certify that this Proposal is made without prior understanding, agreement, or connection with any member of the government agency letting this public works contract.

I understand that collusive bidding is a violation of State and Federal law and can result in fines, prison sentences, and civil damage awards. I agree to abide by all conditions of this Proposal and certify that I am authorized to sign this Proposal for the Offeror.

The Offeror being sworn deposes and says, its agents, officers, or employees have not directly or indirectly entered into any agreements, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in connection with this Proposal.

Company Name: _____

Address: _____

City: _____ State: _____ ZIP: _____

Name: _____ Title: _____

Signature: _____ Date: _____

THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL

EXHIBIT D

CERTIFICATION OF NON-DISCRIMINATION

In connection with the performance of work under this contract, the contractor agrees as follows:

The contractor agrees not to discriminate against any employee or applicant for employment because of race, creed, color, sex, national origin or ancestry. The offeror shall take affirmative action to ensure that employees are treated without regard to their race, creed, color, sex, national origin or ancestry. Such action shall include, but not be limited to the following: employment, upgrading, demotion, transfer, recruiting or recruitment, advertising, lay-off or termination, rates of pay or other compensation and selection for training, including apprenticeship.

In the event the contractor is not in compliance with this non-discrimination clause, the contract may be canceled or terminated by the Owner. The Owner may declare the contractor ineligible for further contracts with the Owner until satisfactory proof of intent to comply shall be made by the offeror.

The contractor agrees to include this non-discrimination clause in any sub-contracts connected with the performance of this agreement.

Contractor

Signature

Date

THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL.

EXHIBIT E ACKNOWLEDGEMENT

The Offeror has examined and carefully studied the Request for Proposal and the following Exhibits, receipt of all of which is hereby acknowledged by placing an "X" in all blank spaces:

_____ Exhibit A – required with submission

_____ Exhibit B – required with submission

_____ Exhibit C – required with submission

_____ Exhibit D – required with submission

_____ Exhibit E – required with submission

Contractor's Representative (First and Last Names)

Signature

Date

Offerors must acknowledge any issued exhibits. Proposals in which fail to acknowledge the Offerors receipt of any exhibits will result in the rejection of the offer if the addendum contains information which substantially changes the County's requirements.

THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL.