**Solicitation Name:** IES SBIR Phase l

**Solicitation Number:** 91990020R0006

**Proposal Manager:** [Fill in]

**Submission Date:** 11 AM EST on March 3, 2020

**Last Updated:** [Fill in]

**Legend:** Forms, Formatting

| Field # | RFP Requirement (Text Extract) | RFP Page, Section, Paragraph | Proposal Volume/Section, Page, Paragraph | Writing Assigned To | Notes Regarding Compliance | Due Date | Status |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1. General Format

To ensure that the text is easy for reviewers to read and that all offerors have the same amount of available space in which to describe their projects, offerors must adhere to the page, type size, and format specifications for the entire proposal narrative, including footnotes.  |
| a. Page and margin specifications | For the purpose of proposals submitted under this solicitation, a “page” is 8.5 inches x 11 inches, with 1 inch margins at the top, bottom, and both sides. |   |  |   |   |  |   |
| b. Spacing | Single space all text in the proposal narrative, including titles, headings, footnotes, quotations, references, and captions, as well as all text in charts, tables, figures, and graphs. |   |  |   |   |  |   |
| c. Type specifications (font specifications) | Type must conform to the following requirements:* The height of the letters must not be smaller than 12 point using Microsoft Word.
* Type density, including characters and spaces, should be no more than 15 characters per inch (cpi). For proportional spacing, the average for any representative section of text should not exceed 15 cpi.
* Type size must yield no more than 6 lines of type within a vertical inch.
* Standard black type must be used for text to permit photocopying.
* Offerors must check the type size using a standard device for measuring type size, rather than relying on the font selected for a particular word processing/printer combination.
 |   |  |   |   |  |   |
| 1. Section III.E. Project Narrative – Key Information, Priorities, Abstract, Company Registry, Certifications, Statements and Legend

This section must be complete and included prior to the Project Narrative – Technology Content.*All of the “E. Project Narrative” components (1 through 3) must be included within pages i, ii, and iii of the Phase I proposal. No other cover pages are permitted to precede page i.* |
| 1. Key Information for the Phase I Proposal | 1. Project Title:
2. Name of the small business:
3. DUNS:
4. Small Business Address and Phone:
5. Company Website URL:
6. Typed name, contact information (address, phone, and email), and signature, for the Principal Investigator using the table found in the solicitation
7. Typed name, contact information, and signature for a representative authorized to represent the small business concern in negotiations using the table found in the solicitation
8. List the names, professional affiliations, project role (e.g., Principal Investigator, Researcher, Developer, Administrative Assistant) and email address for all key members of the project team using the table found in the solicitation
9. Indicate whether the proposal is for the R&D of an entirely new product, for R&D to add new and unique components to a prototype that already exists and is functioning, or for R&D to add new and unique components to a product that is already fully developed. (Select only one.)

⭘ for R&D of an entirely new product where no (or very limited) previous technological development work has occurred, ⭘ for R&D to add new and unique components to a prototype of an education technology product that already exists and is functioning, or ⭘ for R&D to add new and unique components to an educational technology product that is already fully developed.1. Video Demonstration: For proposals to develop a new component to an existing prototype or a fully developed product that already exists and is functioning, the offeror may include a URL (Uniform Resource Locator) link to a video demonstration that presents the current version to a reviewer.

*Specifications:* * *Video Demonstrations are optional to include in the proposal. If a video demo is included, reviewers will view the video as a component of the proposal.*
* *All Video Demonstrations should be posted to YouTube (*[*http://www.youtube.com/*](http://www.youtube.com/)*) prior to the submission deadline, and available during the review period up to 90-days after.*
* *If the Video Demonstration is posted on a website other than YouTube, it is possible reviewers will not be able to watch the video. Videos can be no longer than 4 minutes in duration. Reviewers will be instructed to stop viewing at 4 minutes.*
* *Video Demonstrations are not permitted to be updated after submission. If the posting date on YouTube for the video is later than the submission date, the video will be deemed ineligible for inclusion in the review process.*
* *Offerors are not required to provide a video for proposals for an entirely new product or where no (or limited) previous technological development work has occurred, although offerors may provide a video on related prior research or development project if they choose.*
 |   |  |   |   |  |   |
| 2. Priority | Select one priority area. (Note: While the focus of a proposal may be applicable to more than one priority area – offerors must select the priority area that is the best fit.) See Section IX. for additional information on the Priority Areas.* **PRIORITY AREA 1:** **Products that Apply Emerging Technologies to Support Educational Outcomes**
* **PRIORITY AREA 2: Products to Modernize Assessment and Support Student Learning and Relevant Outcomes**
* **PRIORITY AREA 3: Products Used by Educators or Administrators to Inform Decision Making, including Products to Support Ongoing Research of Educational Programs and Practices**
* **PRIORITY AREA 4: Products to Ready Existing Evidenced-Based Interventions to be Used at Scale**
* **PRIORITY AREA 5: Products to Support Infants, Toddlers, or Students With or At Risk for Disabilities, or Educators (or other Instructional Personnel, Related Services Providers, or Family Members)**
 |  |  |  |  |  |  |
| 3. Abstract | Provide an abstract with the following two components. *Nothing in this section should be proprietary or confidential*.* Technical abstract limited to 200 words.
* A summary of the commercial potential of the product or tool if development were completed as described above limited to 100 words.
 |  |  |  |  |  |  |
| 1. Project Narrative – Technical Content

*Note: “Part II. Project Narrative – Technical Content” constitutes the main body of the Phase I proposal. The project narrative must be titled "Project Narrative – Technical Content" and shall begin on page "1" and proceed to page “15”. (After page 15, offerors may continue numbering pages to the end of their proposal.). All references or citations must be included within this 15-page section. References and citations outside of the 15-page section will not be reviewed. Offerors are encouraged to list the references as the final part of the 15-page narrative, and are encouraged to utilize the formatting citation style of the American Psychological Association (APA). All figures, charts, graphs, tables, or screen shots (outside of what is requested in the Appendices) must be included in this 15-page section. Figures, charts, graphs, tables, or screen shots outside of the 15-page section that are not requested in the Appendices will not be reviewed.* |
| 1. Significance | **a. Problem**Succinctly describe the educational problem (including its scope) that the proposed product is intended to address and justify the importance of investing in R/R&D to solve this problem. |   |  |   |   |  |   |
| **b. The product, its implementation, and the intended outcomes**Describe the product that would be fully developed, after the Phase I *and Phase II* projects are completed.In this description:* (If applicable) if a component of the product is already fully or partially developed, provide a description first so that the reviewers understand what is already developed and what will be new.
* Specify the intended user of the product.
* Describe the platform on which this product will operate (e.g., desktop, tablet, smart phone, Virtual Reality headset). List and briefly describe the key components of the product and any additional materials required to support implementation.
* Describe how the product would function and would be implemented in the intended educational setting. Indicate whether the product would replace, supplement, or be integrated within existing practices.
* Indicate the expected cost to schools to purchase the product overall and per student, and the level of resources (e.g., time, schedules, equipment) needed to implement and use the product. Discuss why this product’s cost and implementation will be feasible for schools and users given their resource constraints.
* Specify the intended educational outcomes that are expected to result from the product’s use. For student learning in core subject areas (STEM, reading, writing, social studies, etc.) offerors must describe relevant standardized outcome measures or protocols to which the intended outcomes will align.
 |   |  |   |   |  |   |
| **c. Theoretical and empirical support**Describe why using the product would lead to the intended educational outcomes. In doing so, make sure to describe an underlying theory and any data from past studies to show that the product, and its components, can be expected to produce the intended results. Provide relevant references to the scientific literature. |   |  |   |   |  |   |
| **d. Related R/R&D by the project team**Describe previous R/R&D conducted by the project team that is directly related to the proposed product. Describe how this previous R/R&D guides and provides a foundation for the proposed effort. 1. For proposals to develop an entirely new product where no (or limited) previous technological development work has occurred, the offeror may include results from concept testing where users (e.g., students, educators, service providers, administrators) provide feedback after viewing mock-ups detailing the proposed product and its intended implementation.
2. For proposals to develop and add new and unique components to a prototype of an education technology product that already exists and is functioning, the offeror (1) must describe the prototype that currently exists, how the current prototype is functioning, and must justify the need for the additional components, (2) must detail prior research on the current prototype’s usability and initial feasibility (and initial reliability and validity if applicable to the focus of the project), and (3) may include results from concept testing where users (e.g., students, educators, service providers, administrators) provide feedback after viewing mock-ups detailing the proposed product and its intended implementation.
3. For proposals to develop and add new and unique components to an education technology product that is already fully developed, the offeror (1) must describe the product that currently exists, how the current product is functioning, and must justify the need for the additional components, (2) must describe the evidence base for the product in its current form, including detailing usability and initial feasibility (and initial reliability and validity if applicable to the focus of the project), and must cite peer-reviewed publications with empirical findings with evidence that the product in its current form shows promise or efficacy for improving outcomes, and (3) may include results from concept testing where users (e.g., students, educators, service providers, administrators) provide feedback after viewing mock-ups detailing the proposed product with the new component and its intended implementation.

**Video Demonstration:** For proposals to develop a new component to add to a prototype or a fully developed product that already exists and is functioning, the offeror may include a URL (Uniform Resource Locator) link to a video demonstration that presents the current version to a reviewer. *See* **E. PROPOSAL PART I: KEY INFORMATION, K. Video Demonstration in the solicitation** *for additional specifications and for the area to insert the URL to the video demonstration.* |   |  |   |   |  |   |
| **e. Uniqueness of proposed product & description of similar products or typical practices and associated costs**Describe why the proposed product will be unique in education. In doing so, describe similar products or practices, shortcomings of the current products or practices, and why the proposed product will be better and not suffer from the same shortcomings. Offerors can include a table with a list of the key components or features of the proposed product compared to similar products or practices used in practice. |   |  |   |   |  |   |
| **f. Potential commercial application**After the product is fully developed through Phase I and II R/R&D, briefly describe how it will be commercialized in the private sector marketplace. This description should include examples of how the product will be disseminated to potential end-users and revenue strategies to sustain the product over time. Describe how the letters of support in Appendix I demonstrate the existence of potential pathways toward the eventual commercial dissemination and sustainability of the proposed product in the private marketplace. ***NOTE:*** *In Appendix I, offerors may include up to three (3) letters to present potential pathways and plans for its eventual commercialization in the private market. See Appendix I, in this document for further information on letters of endorsement.* |   |  |   |   |  |   |
| 2. Project Timeline and Overview | Provide a timeline with a list of the proposed objectives that will be accomplished within eight months. Provide a brief overview of the technological R/R&D activities that will occur in Phase I, including what will be done, where it will be done, and how it will be carried out. |   |  |   |   |  |   |
| 3. Phase I work plan | **a. Development of the prototype**Describe the R/R&D procedures through which a prototype will be developed and fully functioning. Offerors should describe the procedures that will be used to test and refine the prototype, and for concept testing where users (e.g., students, educators, service providers) provide feedback after viewing mock-ups detailing the plans for the full product and its intended implementation. For research to inform iterative refinements during Phase I and for concept testing, offerors should describe how and when data will be collected, the characteristics of the sample users participating in the research (e.g., students, educators), and the procedures for analyzing data and drawing conclusions from it. |   |  |   |   |  |   |
| **b. Pilot Research at the End of Phase I**At the end of the Phase I period, offerors should describe research that will be used to test the usability (or functioning) of the prototype when it is used by the anticipated end user (e.g., student, educator, guidance counselor, speech therapist, administrator). Offerors must also describe research to assess initial feasibility after the prototype is used and the end users are presented the plans or mock-ups for the full product. Research on usability and initial feasibility might involve conducting a small pilot test of the prototype being used in a classroom or school to determine the extent to which the intended user understands or can learn to use the prototype effectively and efficiently and is physically able to use the prototype (usability), and believes this product could be successfully implemented after using the prototype and seeing plans and mock-ups for the for the intended full product concept (initial feasibility).Offerors might include a think-aloud study in which a small sample of intended end-users provides feedback on what they are thinking as they use the prototype and as they see additional plans for the fully developed product. Such studies can help developers, for example, identify instructions that are not clear, determine if users will click on links to obtain additional information, detect trouble spots that users have difficulty navigating, or determine if the full product concept is missing a necessary component that was not originally planned. Note: For proposals in select areas, such as to develop an assessment (PRIORITY 2) or a dashboard that generates information to guide decision making by end users (PRIORITY 3), offerors must also describe research to assess the initial reliability and validity of the prototype after it is used in Phase I.To describe the research to test the usability, initial feasibility, and initial reliability and validity (if appropriate), offerors should include the following details: *Research questions.* Offerors should pose clear, concise research questions. For example:*For Usability*: Does the prototype function as intended? Are users able to follow the instructions for using the prototype? *For Initial Feasibility*: After testing the prototype and seeing plans or mock-ups for the full development of the product, are users engaged by the prototype and the description of the full product? Do users believe the product could be successfully implemented and that the product could have potential for improving user outcomes?*For Initial Reliability and Validity*: Does the prototype produce consistent results across different trials and for different types of users? Is the prototype generating results that are meaningful and that are actually intended? *Sample.* Phase I Pilot studies should include a small sample of individuals who are similar to the intended user population. Describe the population(e.g., students, instructors, administrators)and the setting (e.g., laboratory, school, child-care facility) that will be used in the R/R&D activities to develop the prototype and to assess the usability and initial feasibility of the prototype, and the initial reliability and validity (if applicable). ***NOTE:*** *Offerors must include one letter of agreement from an educational setting for participation in research should the proposal be awarded. This letter should be no longer than one (1) page, and is to be included in Appendix B.**Measures.* Describe the instruments that will be used to measure usability and initial feasibility of the prototype, and initial reliability and validity (if applicable). Include information on reliability and validity of the instruments that will be employed as well.*Procedures.*  Describe when and how data will be collected to determine the usability and initial feasibility, and the initial reliability and validity (if applicable). Include a clear and detailed description of the data analysis procedures, including the hypotheses to be tested and the outcome measures to be used. For quantitative data, specific statistical procedures must be described. For qualitative data, the specific methods used to index, summarize, and interpret data must be delineated. In concluding this section, offerors should discuss how the Phase I R/R&D will provide a foundation for the Phase II R/R&D effort. |   |  |   |   |  |   |
| **c. Potential problems**Describe any potential problem areas that are anticipated in Phase I and provide alternative strategies that would be considered in such circumstances. |   |  |   |   |  |   |
| 4. Project Team – Biographical Summary of Each Key Project Team Member | Within this section in the 15-page narrative, offerors must list and provide a short biographical summary for each member of the project team, including consultants. In the summary provided for the principal investigator, describe educational qualifications and experience that are most relevant to the proposed project. Describe why this individual is capable of managing the proposed project. In the summary of the qualifications of each of the remaining key personnel, describe the role of each individual in the project and their relevant experience.Note: The project team must demonstrate expertise in the design and development of education technology products, education theory and practice, education (or special education) research, research methods for the development and research of education technology (including experience performing research in education settings), and in the commercialization of education or technology-related products. In addition, the team must have expertise in the targeted content domain (e.g., history, early intervention, child development).***NOTE: While biographical summaries must be included within the 15-pages, Appendix C must also include two certifications and a 1-page résumé for each of the key personnel listed above in 4. Project Team.*** |   |  |   |   |  |   |
| 5. Resources | Advanced R/R&D may require the use of sophisticated instrumentation or computer facilities. The offeror must describe the adequacy of available support, including facilities, equipment, supplies, and other resources, from the proposing firm and from sub-contractors to carry out necessary Phase I R/R&D. |   |  |   |   |  |   |
| 1. Section X. APPENDICES TO THE PHASE I PROPOSAL

Offerors must include the required information in Section X. Appendices B, C, E, F, and G are required for all offerors. Appendices A “Prior Phase II Awards” and D “Similar Awards or Proposals” are required for offerors with previous awards that fit the criteria listed within. |
| Appendix A: Documentation and Status of SBIR Phase II Awards since 2006 | If the small business or the principal investigator (when at the small business or previously at a different firm) has received ANY prior SBIR Phase II or Fast-Track awards from any Federal agency since 2006 for a project related to topics in education within the Section IX. Priority Areas within this solicitation, the below information must be provided in Appendix A in Part I (Opening Statement) and Part II (Information on Each Phase II award). If offerors have not received any prior Fast-Track or Phase II awards related to topics in this solicitation, offerors may include a blank page with the heading “Appendix A: No Prior Fast-Track or Phase II SBIR awards to report.” |  |  |  |  |  |  |
| **Part I: Opening Statement**If a small business or the principal investigator in this proposal has won a prior Phase II SBIR awards since 2006 in a related topic in education, a table with an opening statement must be provided as found in the solicitation. |  |  |  |  |  |  |
| **Part II. Information on Each Phase II Award**Using the template found in the solicitation, provide a unique table for each Phase II award won by the small business or the principal investigator related to the topics in this solicitation since 2006. Offerors who do not provide complete and accurate information on all applicable prior awards in the requested format will be rejected without further review. Offerors may expand the sections of the Table as much is needed. |  |  |  |  |  |  |
| Appendix B: Letter of Agreement to Participate in the Phase I R/R&D | In Appendix B, offerors should provide one letter of agreement from an education setting or an early intervention or special education setting to participate in the Phase I research. The letter must not exceed one (1) page in length. This proposal information **is not** counted toward the 15-page limit of the project narrative. |  |  |  |  |  |  |
| Appendix C: Biographical Summary Certification and Résumé Pages | For each individual who is listed and whose biographical summary is included in the 15-page narrative of the proposal, two separate pages must appear in Appendix C with the following information: (1) a certification page, and (2) a 1-page résumé. |  |  |  |  |  |  |
| **(1) Certifications (1-page)**Complete the Certifications form found in the solicitation for each individual on the project team. |  |  |  |  |  |  |
| **(2) Résumé (1-page maximum)**Each key individual on the project team must include a résumé (1-page maximum) in Appendix C. The résumé should include relevant educational qualifications, experience, and bibliographic information including pertinent peer-reviewed publications. **Note:** The Résumé of the Principal Investigator must also include a list of all other commitments during the proposed period of performance.This proposal information **is not** counted toward the 15-page limit of the project narrative. |  |  |  |  |  |  |
| Appendix D: Similar or Closely Related Awards or Proposals | If the small business concern has received ANY prior award(s) from ED, or any other Federal agency *for similar or closely related research*, the offeror must provide the name of the awarding agency, the date of award, the funding agreement number, the amount, and the project title. As well, the offeror must describe the technical differences and reasons why the proposed new Phase I (and eventually Phase II) research is different from the research conducted under prior awards. This information shall be included in Appendix D.If an offeror has submitted identical proposals containing a significant amount of essentially equivalent work, a statement must be included in Appendix D indicating: the name and address of agencies to which proposal(s) was/were submitted; the date of the proposal submission and date of award; the title, number and date of SBIR program solicitation under which proposal was/were submitted; the applicable research priority in the program solicitation for each SBIR proposal submitted or award received; the titles of research projects; the name and title of the principal investigator for each proposal submitted.This proposal information **is not** counted toward the 15-page limit of the project narrative. |  |  |  |  |  |  |
| Appendix E: Budget | In Appendix E, offerors shall provide a narrative budget justification and a budget spreadsheet for the Phase I period. For the narrative budget justification, the offeror should provide a justification for all pricing associated with the proposed project and describe why the pricing are within the scope of the proposed activities. For the budget spreadsheet:* information should be displayed in a spreadsheet (SAMPLE BUDGET is in solicitation),
* all personnel should be listed by name,
* the number of hours assigned to the project for personnel should be included,
* hourly rates for personnel should be included,
* labor costs per person should be included,
* funds for travel must be justified and related to the needs of the project, and

cost sharing should not be included.The Phase I Budget must not exceed $200,000 for an 8-month project, including subcontracts, indirect costs, and fees but excluding any proposed cost sharing.The SBA has stated that SBIR funding agencies are to provide for a reasonable fee or profit on SBIR contracts including grants, consistent with normal profit margins provided to profit-making firms for R/R&D work (SBIR “Policy Directive”). While overhead, fringe, and profit are allowable, ED encourages sufficient funds to be budgeted to cover the cost for the research and development of the proposed prototype |   |  |   |   |  |   |
| Appendix F: Human Subjects | Offerors should include information on human subjects (if applicable) in Appendix F. See Appendix F of the solicitation for information. *Human subjects information* ***is not*** *counted toward the 15-page limit of the project narrative.* |   |  |   |   |  |   |
| [Appendix G: Department of Education Required Information (Forms)](#top) | **NOTE: Offerors without all completed certifications as required in Appendices G. will not be reviewed.**See Appendix G of the solicitation for information on required certification and FAR and EDAR clause acknowledgements.  |   |  |   |   |  |   |
| Appendix H: Special Instructions for Technical Assistance | Per guidance from the Small Business Administration’s Technical and Assistance Business (TABA) Project Working Group in the fall of 2018, ED now provides awardees the option to use part of the Phase I and II awards for technical assistance for specialized strategic business training. If offerors choose to utilize a technical assistance provider/vendor, the offeror is required to include this vendor as a consultant in the budget and to provide a detailed budget justification. (Please note – offerors are not required to utilize funding for this purpose.)Offeror’s may request a maximum of $6,500 per year for a Phase I and a maximum of $50,000 per Phase II project (across all years) for assistance. Reimbursement is limited to services received that comply with 15 U.S.C. § 638(q), as follows:* To provide small business concerns engaged in SBIR projects with technical and business assistance services, such as access to a network of scientists and engineers engaged in a wide range of technologies, product sales, IP protections, market research, market validation, development of regulatory plans, manufacturing plans, or access to technical and business literature available through on-line data bases, for the purpose of assisting such concerns in:
* making better technical decisions concerning such projects;
* solving technical problems which arise during the conduct of such projects;
* minimizing technical risks associated with such projects; and
* developing and commercializing new commercial products and processes resulting from such projects, including intellectual property protections.

To request technical assistance from a provider:* Label the requested cost “Technical Assistance” in the Budget line “Technical Assistance.:
* **In Appendix H, provide a detailed description (1-page maximum) of the technical or business assistance that the vendor will provide, including the name of the vendor and the expected benefits and results of the technical or business assistance.**

**If offerors choose not to utilize technical assistance, they may simply state that Appendix H is not applicable.***This proposal information* ***is not*** *counted toward the 15-page limit of the project narrative.* |  |  |  |  |  |  |
| Appendix I: Letters of Endorsement (Maximum of 3 Letters for Phase I) | In Appendix I, offerors may provide up to three (3) letters to endorse the significance of the proposed product and the potential pathways for commercial dissemination and sustainability of the proposed product. Each letter must not exceed 1-page in length. Letters must adhere to the requirements as set forth in the solicitation.* On average in past years, higher scoring proposals included three (3) letters in Appendix I, and the letters in these proposals often followed the below guidance on what is considered a “strong letter of support.”
* Proposals that included zero (0), one (1), or two (2) letters, and that did not follow the guidance on strong letters of support – were more likely to be triaged or to receive a lower score upon full panel review.

**Notes:** Strong letters of endorsement (1) state the endorser’s qualifications (e.g., why does this individual/organization have expertise in the area of the proposed product?), (2) refer to the specifics of the proposal, (3) speak to the significance of the proposed product and refer to plans for commercial distribution and sustainability, and (4) may specify future roles or involvement with commercialization down the line (e.g., Phase III) should it be successful. Letters speaking to potential pathways for commercial dissemination and sustainability may come from individual experts, associations, organizations in the specific field of interest, future potential distribution partners or investors, from groups of schools or districts who would use or possibly purchase the product if it were commercially available, among others. While letters from university professors or individual educators often speak to the significance of an approach, such letters often are not strong enough for demonstrating pathways toward commercialization on a wide enough scale.As a method to confirm a project team member’s involvement in the project, offerors should *not* include letters of endorsement from key members of the project team, such as consultants or subcontractors. Confirmation of involvement of members of the project team is to be provided in the Biographical Summary of Key Personnel (Section III.F.4) and can be discussed in terms of how the project is managed. Offerors should *not* include letters from banks or personal lenders as a means to demonstrate the potential availability of Phase III financing.Scanned or copied letters of endorsement or emails from endorsers are appropriate for inclusion in the proposal. However, offerors should ensure that all letters of endorsement are legible.Letters can be addressed to: “ED/IES SBIR Program Reviewer”**REQUIRED: Financial Connection Disclosure Requirement** If the endorser and the offeror are currently or were ever financially connected (e.g., the endorsing organization invested in the offeror’s company, the endorsing organization was created specifically to commercialize products developed by the offeror, the endorser paid or is paying the offeror for services or products), the letter of endorsement is required to include a footnote describing the nature of the relationship. This disclosure is intended to clarify for reviewers the precise nature of the relationship between the endorser and the offeror. Please note: Footnotes are not required in letters where there is no current or prior financial connection between the endorser and offeror.This proposal information **is not** counted toward the 15-page limit. |   |  |   |   |  |   |