



GUIDE

SAMPLE RFP

Procuring Vendors for Learning Recovery & Acceleration Efforts

Janice Garland
Julie Corbett

Sample RFP: Procuring Vendors for Learning Recovery & Acceleration Efforts

The National Comprehensive Center

The National Comprehensive Center (NC) is one of 20 technical assistance centers supported under the U.S. Department of Education's Comprehensive Centers program from 2019 to 2024. The NC focuses on helping the 19 Regional Comprehensive Centers and state, regional, and local education agencies throughout the country to meet the daunting challenge of improving student performance with equitable resources.

This publication is in the public domain. While permission to reprint is not necessary, reproductions should be cited as:

Garland, J., and Corbett, J. (2021). *Sample RFP: Procuring Vendors for Learning Recovery & Acceleration Efforts*. Rockville, MD: National Comprehensive Center at Westat.

Special thanks to Bi Vuong, Elbert Harvey, Maureen Richel, Kim Benton, Allison Layland, and Jenn Schiess for reviewing and contributing to an early draft of this document.

The contents of this publication were developed under a grant from the Department of Education. However, the contents do not necessarily represent the policy of the Department of Education, and you should not assume endorsement by the Federal government.

A copy of this publication can be downloaded from <https://www.compcenternetwork.org/>.

This Sample RFP includes suggested language and a suggested process for Local Education Agencies (LEAs) to use while procuring vendors to support learning recovery and acceleration efforts. The RFP aligns with the recommendations in the recent brief [Promising Procurement Practices to Maximize Learning Recovery: Increasing the Effectiveness of Contracting with External Vendors to Provide Services](#). District-specific hyperlinks in the Sample RFP are placeholders for local information and do not link to actual websites. The LEA's context and the sample program model are hypothetical examples based on emerging needs across the country. Users may use this Sample RFP as a template to craft their own RFPs.

For any external vendor contracts, an LEA must first decide, based on its procurement policies, if it would like to engage in a sole source contract, a competitive bid RFP, or if another selection mechanism should be used to procure vendors. Pending no conflict with state or federal policies, local policies may be adapted to allow sole source contracting for larger contracts—though sole source contracting negotiations can still include many of the elements included in this Sample RFP. Use of RFPs with many response requirements for low-value contracts may preclude viable vendors from responding. The level of detail required for responses must be evaluated against the potential market of vendors.

An RFP cover sheet presents time-sensitive dates and times with applicable links, posting date, RFP #, availability of a pre-submittal conference (with registration link), process for submission of questions, and the proposal due date and time (with submission instructions).



**REQUEST FOR PROPOSALS
ISSUED BY THE MODEL CITY SCHOOL BOARD OF
EDUCATION**

83 Monterey Ave., Whistler, Montana 78901

**MIDDLE SCHOOL LANGUAGE ARTS
ADAPTIVE ACCELERATED LEARNING SUPPORT SERVICES
RFP #12345**

Documents are available on Board's website at:

<https://www.mcs.edu/bidopportunities/>

RFP SCHEDULE OF ACTIVITIES	
ACTION	DATE and TIME
RFP Issued	May 10, 2021
OFFEROR'S RESPONSIBILITY: Offerors must familiarize themselves with all documents contained herein; all submitted offers must comply with all the provisions in the Request for Proposal <u>and any addenda</u> posted to the Board website. https://www.mcs.edu/bidopportunities/	



RFP SCHEDULE OF ACTIVITIES	
ACTION	DATE and TIME
<p>Pre-Submittal Conference</p> <p>Attendance is strongly encouraged but not mandatory.</p> <p>Note: Submit all questions regarding this RFP in writing via the pre-submission conference registration: https://www.mcs.edu/bidopportunities/</p> <p>Written responses to all questions will be posted on the website within 24 hours of the Pre-Submittal Conference.</p>	<p>May 13, 2021, by 3:00 P.M. (MT)</p> <p>Pre-Submittal Conference Registration (and submission of questions): https://docs.google.com/forms/12345/form</p> <p>May 14, 2021 2:00 P.M. (MT)</p> <p>Pre-Submittal Conference https://meet.google.com/bid_12345</p>
<p>RFP Proposal Submission Deadline</p> <p><i>Proposals MUST be received by the due date and time.</i> Late proposals will not be accepted.</p>	<p>June 1, 2021, at 2:00 P.M. (MT)</p> <p>PROPOSAL SUBMISSION through the link: https://mcs.procurement.com/12345</p>
<p>Offerors requiring additional assistance shall contact Preston Varg at pvarg@mcs.edu. Submit written requests for clarification to the individual above and include the Bid Number for reference. No telephone calls will be accepted.</p>	
Evaluation of Proposals	June 7–9, 2021
Oral Presentations (if applicable)	June 14–16
Intent to Award	June 16, 2021 (tentative)



Contents

Section 1: Administrative Overview	1
1.1 Purpose and Background	2
1.2 Access to RFP Solicitation and Addenda	4
1.2a Offeror Responsibilities	4
1.2b Errors and Omissions of RFP	4
1.2c Proposal Withdrawal	4
1.3 Schedule of RFP Activities	4
1.3a Pre-Submittal Conference	4
1.3b RFP Proposal Submission	4
1.3c Committee Evaluation of Submissions— June 7–9, 2021	5
1.3d Selected Offeror(s) Notified	5
1.3e Oral Presentations (potential) – June 14–16 (tentative dates)	5
1.3f Contract Negotiations – June 1–16 (tentative dates)	5
1.3g Board of Education Approval – June 23, 2021 (tentative dates)	5
1.4 Questions Regarding This RFP	5
1.5 Restriction on Communications	5
1.6 Submission	5
1.6a Specific Proposal Submission Instructions	6
Section 2: Scope of Work	7
2.1 Requirements and Timeline	7
2.2 Process for Progress Monitoring and Evaluation	9
2.2a Progress Monitoring	9
2.2b Evaluation	10
2.3 Operating Conditions	10
2.4 Budget, Contracting Structure, and Timeline	11
Option 1 – Traditional Pay for Service	11
Outcomes-Based Contract (OBC) Options	11
Option 2 – Performance Contract	11
Option 3 – Success Contract	12
Option 4 – Performance & Success Contract	13

Section 3: Statement of Work	16
3.1 Overview of Project Vision	16
3.2 Program Model	16
3.3 Offeror’s Expertise, Experience, and Understanding of Project	16
3.4 Project Timelines, Milestones, and Key Deliverables	16
3.5 Performance Measures and Outcomes	16
3.6 Coordination of Resources and Non-Negotiables	17
3.7 Organizational Chart and Qualifications of Key Staff	17
3.8 Organizational History and Qualifications	17
3.9 Budget Model	17
3.10 References	17
Section 4: RFP Evaluation	18
4.1 Proposal Evaluation	18
4.2 Proposal Scoring Criteria	18
4.3 Preferences	19
4.4 Oral Presentations/Demonstrations Clarifications	19
4.4a Right to Use Oral Presentations to Verify/Expand on Proposal	19
4.4b Oral Presentation Evaluation Criteria	19
Section 5: Negotiation	19
Section 6: Collusion	19
Section 7: Employee Background Certification	20
Section 8: Termination	20
Section 9: Insurance	20
Section 10: General Terms and Conditions	21
Appendix A. Budget Proposal	22
Appendix B. RFP Cover Page	23
Appendix C. Certification of Non-Collusion	24



The Administrative Overview describes: (a) the schedule of activities and timelines and repeats key actionable dates with applicable links; (b) the LEA's purpose and background of the problem are described; and (c) the terms for submission of questions pertaining to the RFP are outlined.

Section 1: Administrative Overview

The Model City Board of Education, commonly known as the Model City Public Schools (the “**Board**” or “**MCS**” or the “**District**”), invites the submission of proposals (“**Proposals**”) from firms (“**Offerors**”) that wish to provide Middle School Language Arts Adaptive Accelerated Learning Support Services.

Consider whether:

- » The Board reserves the right to (i) select one or more Offerors to provide the services and products; (ii) reject any and all Proposals; and (iii) identify any areas where a conflict of interest may result in limitations on a firm.
- » The Offeror is allowed to propose a joint venture or prime contractor with subcontractor Proposal. If so, what are the additional requirements for a joint or prime/subcontractor proposal? Will the Board reserve the right to accept a prime contractor and reject a subcontractor?
- » Any submission requirements may preclude eligible firms from responding (e.g., tight deadlines, electronic vs. hard copies, in person vs. virtual presentations).

District Profile

This section provides an overview of the District, including:

- » location;
- » number of schools (by grade composition);
- » total number of students served;
- » student demographic breakdown (e.g., race, gender);
- » student program participation information (e.g., students receiving free or reduced priced meals, students receiving special education services, multilingual students, and/or other factors that may be important for a vendor to know); and
- » mission statement/vision.

Model City Public Schools (MCS) is a small district on the northwest outskirts of the Crenshaw, Montana, suburbs. The District's five elementary schools (PK–5), three middle schools (6–8), and one high school (9–12) enroll a racially and economically diverse population of approximately 5,000 students, supported by approximately 480 faculty and staff. About 15 percent of students



speak a language other than English at home, and 55 percent of students receive Free and Reduced Priced Meals. The racial/ethnic makeup of the student population is predominately White, Latino, and Native American. The educational philosophy of the District is that each child will reach their full potential when provided quality instruction and support. MCS' mission is that that all students are prepared to succeed in and to contribute to our community, workforce, and life.

1.1 Purpose and Background

Include information about the purpose of the project/program/contract.

Highlight prior relevant programs, interventions, or initiatives, including information on past programs and interventions and any district- or school-level initiatives to inform Offerors of past efforts and results.

Define parameters that any programs and services need to work within or that may present opportunities for integration. Include timelines, strategies, and desired results.

Consider using a table or narrative text to describe relevant data about the school, district, and community.

In addition, the LEA can be explicit in using one of two approaches to program design.

1. The LEA indicates a pre-defined program/solution to address the needs, or
2. The LEA presents the needs and requests that vendors to propose a way to address the issue identified given the constraints (e.g., training for teachers can occur only during common planning day, which is biweekly for 45 minutes).

This Sample RFP represents the first of the options, proposing the desired solution for vendor response.

Mitigating the effects of lost instruction time and opportunities during the COVID-19 pandemic requires an instructional model that meets students where they are and bridges the gap to grade-level content and skills. From March 2020 to June 2020 and October 2020 to June 2021, students participated in virtual learning while schools were closed for in-person instruction (a total of 12 months). This RFP seeks classroom-based instructional coaches for two MCS middle schools to support each school's District-employed literacy coach, deliver job-embedded professional development and support grade-level English teachers to plan and implement implicit comprehension instruction using an adaptive accelerated learning model and the current word study program with fidelity. MCS seeks proposals for 6–8 instructional coaches to support 2–3 English teachers at each grade level (6, 7, and 8) in two of three middle schools. There are 11 teachers in one school and 9 teachers in the other for 20 teachers total. English class size is approximately 25 students.



Data analysis of these two MCS middle schools' "all students" subgroups demonstrates student achievement 12–17 percent below the state average in reading for the past 4 years. These two schools have lagged the state average in eighth-grade writing by 10–18 percent over the past 3 years, and larger student achievement gaps are found by disaggregating the data by student subgroups by race, English Learner status, and students receiving special education services. There has been no notable increase ($\geq 2\%$) in reading or writing scores in 4 years. Thirty-four percent of students read two or more grade levels below average as of Spring 2019. Each school's demographics include approximately 35 percent White/Caucasian, 30 percent Latino/Hispanic, 25 percent Native American, and 10 percent other or two or more races, with a poverty rate of 60–72 percent. Student attendance rates for 2020–2021 virtual learning were 60 percent and 57 percent, lagging virtual attendance for all other District schools by at least 20 percent. A significant achievement gap in student reading and writing will persist beyond Summer learning opportunities into Fall 2021 for two or more years. While many of the District's schools saw decreased gains during the COVID-19 pandemic, these two schools demonstrated the smallest gains and increased gaps.

Based on curriculum audit findings in Fall 2018, MCS adopted a three-prong approach to classroom literacy instruction: implicit vocabulary instruction, implicit comprehension instruction, and embedded writing and research. Following teacher training in Summer 2019, MCS began implementing implicit vocabulary instruction using a word study program through English courses and a tiered academic vocabulary approach in core content areas in Fall 2019. Implementation in this area was put on hold due to COVID-19-related in-person school closures from Spring 2020 through Spring 2021. Some supports were provided remotely to staff by the literacy coaches, but true job-embedded professional development lacked in fidelity of implementation. Returning and new teachers will revisit the professional development for implicit vocabulary instruction in Summer 2021 to support continued implementation. During Summer 2021, students will be offered 24 days of Summer learning recovery with 2 hours daily devoted to language arts (via an interdisciplinary project-based learning model that incorporates guided reading). Contracted instructional coaches will provide 1:1 classroom-level support for teachers in the planning and implementation of implicit comprehension instruction and implicit vocabulary instruction throughout the school term. Beginning in late August 2021, the contracted instructional coaches will collaborate with the two school-level literacy coaches to plan training on implicit vocabulary and implicit comprehension instruction using an adaptive accelerated learning model, develop an implementation and monitoring plan, and design tools to collect implementation and outcome data. Training and support from the instructional coach or coaches and the District-employed literacy coaches will be provided during the English Department's weekly common planning day.

In addition, MCS has provided all teachers socio-emotional learning training and learning packets to support establishing classroom communities schoolwide for Fall 2021. Where appropriate, methods used to foster classroom communities should be embedded into the instructional supports



in core content areas, such as English/Language Arts. Alignment between the instructional supports and the socio-emotional learning efforts are expected.

1.2 Access to RFP Solicitation and Addenda

The RFP document, all attachments, and any addenda to this RFP are available for download from the Board's website at: <https://www.mcs.edu/bidopportunities/>. The RFP document package is also available by email request to the Procurement Officer, Preston Varg at pvarg@mcs.edu. Any addenda will be emailed to a requestor upon posting. No calls will be accepted.

Any revision or expansion of the terms, conditions, or specifications provided in this RFP deemed necessary before the due date of Proposals will be made in the form of an addendum on the Board website: <https://www.mcs.edu/bidopportunities/>.

1.2a Offeror Responsibilities

Offerors must thoroughly read the RFP. Offerors are solely responsible for ensuring that they have received all necessary procurement documentation, including any addenda. The Board is not responsible for ensuring that any Offeror receives all procurement documentation.

1.2b Errors and Omissions of RFP

Should Offeror suspect any error, omission, or discrepancy in the specifications or instructions, Offeror shall immediately notify the Procurement Officer (as specified above), and MCS will issue written corrections or clarifications in an addendum, if necessary.

1.2c Proposal Withdrawal

Proposals may be withdrawn at any time prior to the due date. All requests to withdraw must be in writing. The request should be labeled and addressed in the same way as the original Proposal and should be clearly marked to indicate that it is a withdrawal of the Proposal.

1.3 Schedule of RFP Activities

1.3a Pre-Submittal Conference

The Pre-Submittal Conference on **May 14, 2021, at 2:00 P.M.** is not mandatory; however, participation is strongly encouraged. All written questions submitted with the Pre-Submittal Conference registration by the May 13, 2021 3:00 P.M. deadline will be answered during the conference. Written clarification of questions will be posted on the Board's website for review by all Offerors. Oral clarifications offered by any Board employee are not binding.

1.3b RFP Proposal Submission

All Proposals are **due no later than June 1, 2021, by 2:00 P.M. Mountain Time (MT)**. Proposals will be submitted digitally according to directions in **section 1.6**. *Late proposals will not be accepted. The date/time stamp from the electronic bidding system is the only acceptable evidence to establish the time of receipt.*



1.3c Committee Evaluation of Submissions—June 7–9, 2021

The District's RFP Evaluation Committee reserves the right to request selected finalists to present to the evaluation team June 14–16, 2021. Finalists will be provided an outline and time limit for providing an overview of the Proposal's comprehensive vision and unique approach to address the problem statement. If selected as a finalist, the virtual presentation is mandatory. The Evaluation Committee will attend and score virtual vendor presentations. The scoring criteria are found in section 4.2.

1.3d Selected Offeror(s) Notified

Offeror will be notified of Intent to Award or Offerors will receive Notice of Required Oral Presentation) by **June 10, 2021**. If presentations are requested, Offeror will be notified of Intent to Award by **June 16, 2021**.

1.3e Oral Presentations (potential) – June 14–16 (tentative dates)

1.3f Contract Negotiations – June 1–16 (tentative dates)

1.3g Board of Education Approval – June 23, 2021 (tentative dates)

1.4 Questions Regarding This RFP

ALL QUESTIONS REGARDING THIS RFP MUST BE SUBMITTED IN WRITING VIA THE PRE-SUBMISSION CONFERENCE REGISTRATION FORM NO LATER THAN MAY 13, 2021 AT 3:00 P.M. (MT): <https://docs.google.com/forms/12345/form>.

Offerors requiring additional assistance shall contact Preston Varg at pvarg@mcs.edu. The Offeror may submit a written request for clarification to this individual with reference to the Bid Number provided on the cover page of the RFP. **No telephone calls will be accepted.**

1.5 Restriction on Communications

Any attempt to directly contact any Model School City School District employees, elected officials, or their representatives regarding the RFP may result in disqualification of the Offeror. Any oral communications will be considered unofficial and non-binding on the District.

1.6 Submission

PROPOSAL SUBMISSION COVER LETTERS SHALL BE ADDRESSED TO:

**Model City School Board of Education
Attn: Preston Varg, Procurement Officer
83 Monterey Ave.
Whistler, MT 78901**



PROPOSALS MUST BE RECEIVED NO LATER THAN JUNE 1, 2021 AT 2:00 P.M. (EST) THROUGH THIS LINK <https://mcs.procurement.com/12345>.

1.6a Specific Proposal Submission Instructions

Proposals should be thoroughly detailed and provide a straightforward concise description of methods, staffing organization and qualifications, and capabilities to satisfy the requirements of the RFP.

Proposals shall be formatted electronically in **ONE PDF document, single spaced, 12 pt font size, no more than 15 pages for the narrative response and no more than 15 pages of appendices**, with page numbers, submitted in the order as follows with applicable headers:

1. **SIGNED** RFP cover sheet (Appendix B) signed by an authorized representative of Offeror
2. Narrative Response
 - a. Overview of project vision
 - b. Program model
 - c. Offeror's expertise, experience doing similar work, and understanding of RFP and the technical approach
 - d. Project timelines, milestones, and key deliverables
 - e. Performance measures and outcomes
 - f. Coordination of resources
 - g. Non-negotiables
 - h. Organizational history, chart, and qualifications of key project staff
 - i. Budget narrative/justifications
3. Budget Proposal (Appendix A)
4. References (at least three)
5. Completed and signed Non-Collusion Form (Appendix C)
6. Resumes of key project staff

Offerors shall be responsible for the successful submission of the Proposal before the advertised date and hour for the receipt of Proposals. Proposals submitted past the advertised date and hour for Proposal receipt will not be considered.



Section 2: Scope of Work

Key elements for the Scope of Work section

- » Define the timeline, requirements, and constraints: (such as any expectations for parent/caregiver engagement, access to online or other technological needs, etc.).
- » Be specific but not so specific that you exclude potential vendors.
- » Identify basic expectations for LEA, Vendor, and School-Level personnel (the roles and responsibilities can be fleshed out in more detail during contracting).
- » Describe the process for monitoring and evaluation, including timelines and measurable data points and clearly articulate performance expectations.
- » Consider multiple measures of data that address areas such as student learning, implementation processes, changes in adult practice, and perceptual data.
- » Include any vendor expectations on reporting, feedback, and compliance with requests for program adjustments.
- » Identify constraints that the vendor may need to be aware of for planning purposes.
- » Provide the budget (an amount or range), contracting structure, and timeline.

Note: Sometimes RFPs are purposely flexible to garner additional and innovative approaches to a problem. To gather strong and applicable responses, be strategic in which parts of a proposal should be flexible and open to insight innovation and which parts require context to encourage specificity.

Developing a fully defined program or solution (as this Sample RFP does) may require more planning time up front from the LEA. If the LEA wants the vendor to propose solutions, provide the core deliverables and expectations as guideposts to help the vendor design their proposal.

2.1 Requirements and Timeline

High-quality instruction is the most important variable for student learning and achievement, especially for students who have not received the support they have needed to thrive in the past. Job-embedded professional development protects instructional time while providing teachers the knowledge and skills for effective, efficient implementation of implicit instruction in reading comprehension and word study. Ongoing coaching encourages reflection, assists with timely instructional enhancements, and improves the fidelity of implementation. MCS seeks proposals for 6–8 instructional coaches to support 2–3 English teachers at each grade level (6, 7, and 8) in each of the two middle schools. There are 11 teachers in one school and 9 in the other for a total of 20 teachers. English class size is limited to 25 students.



The initial contract awarded from this RFP may be awarded for 2 years, with the second year conditional upon meeting performance outcomes in Year 1. The contract begins on or about August 15 and extends through June 30 each year. An additional 1-year extension (for a third year) may be awarded based on program outcomes from the initial 2-year contract.

Based on past supports and interventions, MCS believes that the instructional coaches' time will be spent, and evidenced by documentation, as follows: approximately 65 percent directly supporting classroom teachers build their planning and delivery capacity of implicit reading instruction and word study; 15 percent analyzing NWEA MAP reading skills data in collaboration with teachers to inform grouping and differentiated instruction; 10 percent co-developing trainings with the literacy coaches, and 10 percent progress monitoring and preparing for or participating in monitoring and evaluation meetings. Instructional coaches will provide on-site support for 20 hours per week in Year 1 and 10 hours per week in Years 2 and 3. Instructional coaches may model or directly support student groups while establishing a structure for adaptive learning as a component of the support for classroom teachers. Instructional coaches should be ready to pivot to virtual coaching as needed.

MCS seeks proposals from vendors that will achieve the desired outcomes. The exact model of service delivery, time breakouts, and so forth, may vary based on the vendor's experience and expertise addressing similar needs in other districts. We are open to alternative proposals that address our needs.

An instructional coach must be:

- » A degree holder (bachelor's or higher) preferably in reading or English (or other grade-level or content area with a minimum of 9 hours of university-level reading coursework)
- » Knowledgeable of the English grade-level state standards in reading, writing, grammar, and research, as well as the vertical articulation of skills
- » Skilled in interpreting NWEA MAP results for grouping, student goal-setting, and progress monitoring
- » Experienced in late elementary or adolescent literacy
- » Able to build respectful and supportive relationships with teachers and students
- » Familiar with word study

Roles of an instructional coach include:

- » Collaborating with the literacy coach in the planning and delivery of training and implementation support for implicit comprehension instruction and use of NWEA MAP reading data for grouping students, including structural classroom models for implementation
- » Helping teachers establish structures that enhance classroom communities and provide an optimal environment for adaptive accelerated learning



- » Supporting teachers plan and deliver an instructional framework that addresses grade-level content and skills in reading, language arts, and writing based on Fall MAP data
- » Assisting teachers in developing structures and processes that support individual students set goals, including progress monitoring, reflection, and next steps
- » Analyzing and interpreting monitoring and evaluation data; proposing adjustments to instruction to align with student needs and overall process improvement; and collaborating with literacy coaches for any additional teacher training identified during implementation support

Adaptive instruction may include one or more of the following formats:

- » Digital content
- » Planned centers
- » Teacher-led groups
- » Peer-led groups
- » An interdisciplinary approach integrating science, social studies, art, or other content areas

2.2 Process for Progress Monitoring and Evaluation

Clearly delineate the progress monitoring and evaluation metrics and processes, including the data the LEA provides and any data the vendor is expected to provide.

Include both student outcomes measures and changes to adult practices.

Multiple measures of data will be used for quarterly progress monitoring and the annual program evaluation. Data that are collected and shared should include information related to student learning, the implementation process, and perceptions of implementation fidelity, teacher engagement and learning, and student outcomes; the Offeror should outline the actual measures that will be used to demonstrate student learning and assessment of implementation. The district will also collect its own data as a part of progress monitoring to support continuous improvement and vendor service evaluation (see section 2.2a). The Director of Curriculum and Instruction will provide District oversight. The school-level administrative team and literacy coaches will provide ongoing monitoring in classroom implementation and support. The Director of Curriculum and Instruction, school-level administrative team, literacy coaches, and instructional coaches will prepare for and participate in the quarterly monitoring and evaluation meetings. The principal at each school will have the authority to direct the project team when performing the services on the school site.

2.2a Progress Monitoring

Progress monitoring meetings will be held within 1 week of the end of each quarter. District-collected survey results from school-level administrative team, literacy coaches, teachers, and instructional coaches will provide perceptual data on satisfaction with instructional coaches'



support role, effectiveness of training, teacher commitment to the model, and fidelity of implementation. School-level administrative team member walkthrough data will be used to monitor student engagement and teacher implementation. The goal for teacher implementation fidelity of the model is 80 percent by the end of Year 2. School-collected student Lexile data will be used to measure increases in reading levels. The principal, English grade-level lead, literacy coach, and instructional coaches will review the implementation progress. Data analysis will inform documented next steps. Midyear and end-of-year NWEA MAP reading scores will be used to measure student progress against the Fall baseline reading scores.

2.2b Evaluation

Program success will be measured against the District goal of ≥ 70 percent of students meeting or exceeding their growth goal in reading on the Spring 2023 NWEA MAP (end of Year 2), with adequate progress toward the goal measured in Spring 2022 (end of Year 1). In addition, the student-cohort pass rate on the Spring 2023 state reading assessment will increase by ≥ 6 percentage points from Spring 2021, with adequate progress toward the goal measured in Spring 2022. Each year's final quarter perceptual data on satisfaction with instructional coaches' support, teacher commitment to the model, and implementation fidelity will inform measured success.

District data analysis will compare student progress in both of these supported middle schools against the non-supported middle school to assess whether gains might be due to other factors. Specific student outcome and adult practice measures and goals will be determined during contract negotiations.

2.3 Operating Conditions

Clearly delineate all operating conditions that might impact or constrain the vendor's proposals—knowing that some of the conditions might preclude potential vendors from responding if they believe the fidelity of their model would be hindered.

A vendor must be able to provide services within the following context:

- A.** Instructional coach-led training or meetings must occur during the grade-level teacher planning block and meeting dates/agendas/minutes shared with the literacy coach and principal.
- B.** Digital content, if used, should be currently licensed by the school.
- C.** Students shall use only their District-issued laptops.
- D.** Offeror must provide background checks in a District-approved format for all Offeror's personnel entering the school to support project services.
- E.** Offeror must meet or exceed industry standards for data security of personally identifiable information. Offeror must also meet or exceed industry standards for handling any student



information that may come into Offeror's possession, per Family Educational Rights and Privacy Act (FERPA) guidelines.

- F. School/District approves the Offeror's on-site staff to ensure a "good fit" and positive working relationship. The District reserves the right to require a change in the Offeror's on-site staff.

2.4 Budget, Contracting Structure, and Timeline

Budgets for this work likely range from \$450,000 to \$575,000 over the initial 2-year contract. Projected budgets that are lower or higher than the estimated amounts will be considered. The contract for services described in this RFP will begin at contract execution and begin on or about August 15, 2021, ending on June 30, 2023, running from mid-August through June 30 each year with an initial term of 2 years, the second year being conditional upon meeting performance expectations in Year 1. The Board will have the option to extend the contract for 1 additional year beyond the first two years. The option for a 1-year contract extension is dependent on program outcomes achieved during Years 1 and 2.

Option 1 – Traditional Pay for Service

The Offeror will be paid the price proposed in the submission response to this RFP (or later negotiated with the District) for the delivery of services, and not outcomes. This will be paid on a deliverable basis (e.g., five trainings, eight data reviews, five coaching sessions/teacher); the Offeror should provide a clear outline of the deliverables and costs for each deliverable. The exact number of services delivered should be recommended by the Offeror.

Delivery of Services (100% of contract value)	Amount
6 trainings for teachers	35%
6 monthly data reviews	30%
5 instructional coaching sessions per teacher	35%

Outcomes-Based Contract (OBC) Options

Option 2 – Performance Contract

The Offeror will be paid 80 percent of the contracted amount for the delivery of services as described and will receive the remaining 20 percent for implementation fidelity and teacher perception. The delivery of services portion of the contract is focused on "did I deliver what I said I'll deliver" while the performance component of the contract is focused on "was it successfully delivered?" A proposed funding structure follows; however, the Offeror may propose a different structure besides an 80/20 split. The exact number of services delivered and expected outcomes should be recommended by the Offeror.

Services	Amount
Delivery of Services (80% of contract value)	
5 trainings for teachers	25%



Services	Amount
6 monthly data reviews	20%
5 instructional coaching sessions per teacher	35%
Performance (20% of contract value)	
Training: All teachers (20) attend all five trainings and are trained on all modules	2%
Training: End-of-training survey: For each of the five training sessions, at least 75% of participants indicated “agree” or “strongly agree” that the training sessions offered instructional strategies they can use with their students.	5% (1% for each training session)
Data Reviews: End-of-data review survey: For each of the six data reviews, at least 75% of participants indicated “agree” or “strongly agree” that the data review sessions offered instructional strategies they can use with their students.	6% (1% for each session)
Instructional Coaching: All teachers receive five instructional coaching sessions, with three before winter break and two before April.	2%
End of year Survey* (administered by the District) where 80% of respondents indicate that the trainings improved or significantly improved their instructional practice. AND 80% of teacher survey respondents indicate that they have changed an instructional practice as a result of the coaching. *MCS will work to obtain at least an 80% survey response rate	5%

Option 3 – Success Contract

The Offeror will be paid 70 percent of the contracted amount for the delivery of services as described and will receive the remaining 30 percent for improvement in student outcomes and instructional improvements. The Offeror could also receive a bonus (up to \$25,000) beyond the terms of the contract for exceeding pre-determined outcome measures. The exact number of services delivered and expected outcomes should be recommended by the Offeror. The following table provides a sample payment structure for a 2-year contract:

Year 1

Services	Amount
Delivery of Services (70% of contract value)	
5 trainings for teachers	25%
6 monthly data reviews	20%
5 instructional coaching sessions per teacher	25%
Student & Instructional Success (30% of contract value)	
A higher percentage of students in the supported schools meet their growth goals on the Spring NWEA assessment compared to the non-supported middle school (i.e., closing the gap)	10%

Services	Amount
Student-cohort pass proficient rates on state reading assessments is ≥ 5 percentile points in Spring 2022 compared to the Spring 2021 baseline score	10%
In an end-of-year survey* (administered by the District) 80% of teacher respondents indicated that the trainings improved or significantly improved their instructional practice	5%
80% of teacher survey respondents indicated that they have changed an instructional practice as a result of the coaching (*MCS will work to obtain an 80% response rate)	5%

Year 2

Services	Amount
Delivery of Services (70% of contract value)	
5 trainings for teachers	25%
6 monthly data reviews	20%
5 instructional coaching sessions per teacher	25%
Student Success (30% of contract value)	
A higher percentage of students in the supported schools meet their growth goals on the Spring NWEA assessment compared to the non-supported middle school (i.e., closing the gap)	10%
Student-cohort pass proficient rates on state reading assessments is ≥ 6 percentile points in Spring 2023 compared to the Spring 2021 baseline score	10%
In an end-of-year survey* (administered by the District) 80% of teacher respondents indicated that the trainings improved or significantly improved their instructional practice	5%
80% of teacher survey respondents indicated that they have changed an instructional practice as a result of the coaching (*MCS will work to obtain an 80% response rate)	5%
Student Success (\$25,000 bonus—above contract value)	
A higher percentage of students in the supported schools meet their growth goals on the Spring NWEA assessment (in each of five disaggregated subgroups) compared to the non-supported middle school	\$2,000 for each subgroup (total \$10,000)
Student-cohort pass proficient rates on state reading assessments is ≥ 8 percentile points in Spring 2023 compared to the Spring 2021 baseline score	\$15,000

Note: MCS will be responsible for the assessment of student success. MCS commits to sharing its methodology with the Offeror before the analysis to ensure a common understanding of the underlying data.

Option 4 – Performance & Success Contract

In Year 1, the Offeror will be paid 70 percent of the contracted amount for the delivery of services as described, 20 percent will be paid for performance, and 10 percent be paid for improvement in student outcomes.

In Year 2, the Offeror will be paid 60 percent of the contracted amount for the delivery of services as described, 20 percent will be paid for performance, and 20 percent be paid for improvement in student outcomes.

The Offeror can also receive a bonus (up to \$25,000) beyond the terms of the contract for exceeding pre-determined outcome measures. The exact number of services delivered and expected outcomes should be recommended by the Offeror. The following table provides a sample payment structure for a 2-year contract.

Year 1

Services	Amount
Delivery of Services (70% of contract value)	
5 trainings for teachers	25%
6 monthly data reviews	20%
5 instructional coaching sessions per teacher	25%
Performance (20% of contract value)	
Training: All teachers (20) attend all five trainings and are trained on all modules	2%
Training: End-of-training survey: For each of the five training sessions, at least 75% of participants indicated “agree” or “strongly agree” that the training sessions offered instructional strategies they can use with their students.	5% (1% for each training session)
Data Reviews: End-of-data review survey: For each of the six data reviews, at least 75% of participants indicated “agree” or “strongly agree” that the data review sessions offered instructional strategies they can use with their students.	6% (1% for each session)
Instructional Coaching: All teachers receive five instructional coaching sessions, with three before winter break and two before April.	2%
End of year Survey* (administered by the District) where 80% of respondents indicate that the trainings improved or significantly improved their instructional practice. AND 80% of teacher survey respondents indicate that they have changed an instructional practice as a result of the coaching. *MCS will work to obtain at least an 80% response rate	5%
Student & Instructional Success (10% of contract value)	
A higher percentage of students in the supported schools meet their growth goals on the Spring NWEA assessment compared to the non-supported middle school (i.e., closing the gap)	5%
Student-cohort pass proficient rates on state reading assessments is \geq 5 percentile points in Spring 2022 compared to the Spring 2021 baseline score	5%

Year 2

Services	Amount
Delivery of Services (60% of contract value)	
5 trainings for teachers	20%
6 monthly data reviews	20%
5 instructional coaching sessions per teacher	20%
Performance (20% of contract value)	
Training: 100% of teachers (20) attend all trainings and are trained on all modules	2%
Training: End-of-training survey: For each of the training sessions, at least 75% of participants indicated “agree” or “strongly agree” that the training sessions offered instructional strategies they can use with their students.	5% (1% for each training session)
Data Reviews: End-of-data review survey: For each of the six data reviews, at least 75% of participants indicated “agree” or “strongly agree” that the data review sessions offered instructional strategies they can use with their students.	6% (1% for each session)
Instructional Coaching: All teachers receive five instructional coaching sessions, with three before winter break and two before April.	2%
End of year Survey* (administered by the District) where 80% of respondents indicate that the trainings improved or significantly improved their instructional practice. AND 80% of teacher survey respondents indicate that they have changed an instructional practice as a result of the coaching. *MCS will work to obtain at least an 80% survey response rate	5%
Student Success (20% of contract value)	
A higher percentage of students in the supported schools meet their growth goals on the Spring NWEA assessment compared to the non-supported middle school (i.e., closing the gap)	10%
Student-cohort pass proficient rates on state reading assessments is ≥ 6 percentile points in Spring 2023 compared to the Spring 2021 baseline score	10%
Student Success (\$25,000 bonus—above contract value)	
A higher percentage of students in the supported schools meet their growth goals on the Spring NWEA assessment (in each of five disaggregated subgroups) compared to the non-supported middle school	\$2,000 for each subgroup (total \$10,000)
Student-cohort pass proficient rates on state reading assessments is ≥ 8 percentile points in Spring 2023 compared to the Spring 2021 baseline score	\$15,000

Note: MCS will be responsible for the assessment of student success. MCS commits to sharing its methodology with the Offeror before the analysis to ensure a common understanding of the underlying data.

Section 3: Statement of Work

The Offeror must present a comprehensive plan that clearly addresses the defined problem statement. Address each of the required components in the Statement of Work (sections 3.1–3.8).

3.1 Overview of Project Vision

Provide a written narrative demonstrating the Offeror’s understanding of services sought, and describe the Offeror’s underlying philosophy in providing the services.

3.2 Program Model

Detail the project approach, components, and methodology. Provide a draft schedule with phases of work (a more detailed schedule can be included in section 3.4). Include the Offeror’s strengths, insights, or innovativeness.

3.3 Offeror’s Expertise, Experience, and Understanding of Project

Describe the Offeror’s expertise, experience with similar projects and for like schools/districts, and understanding of the project and District’s needs.

3.4 Project Timelines, Milestones, and Key Deliverables

Expectations for Service Delivery and Outcomes

- » Clarify the LEA’s expectations of the partnership by sharing the types of input measures (e.g., training, implementation support); output measures (capacity-built, increased use of data to inform instruction); and outcomes (improved student achievement, engagement).
- » By including the Offeror’s Phase-Out Plan on the timeline, restate the LEA’s expectation that the Offeror’s purpose is to build capacity within the District to do the work.

Describe the project milestones and key deliverables and provide an overall project timeline of the proposed work.

3.5 Performance Measures and Outcomes

Describe how the Offeror’s project team will support the school in performance monitoring, evaluation, and analysis of the implementation process. Include how the Offeror will collaborate with the District to address actionable requests based on monitoring and evaluation results.

Engaging Offerors

- » Authentically engaging the Offeror in progress monitoring and evaluation will enhance the LEA/Offeror relationship and foster shared ownership of the process and outcomes.
- » Include capacity-building measures in progress monitoring and evaluation.



3.6 Coordination of Resources and Non-Negotiables

List the required resources from the District or school needed to support the service model, including data variables. Describe any Offeror resources that may support the service model. Identify any Offeror non-negotiables related to resources or service delivery.

3.7 Organizational Chart and Qualifications of Key Staff

Provide an organizational chart of the project team. Briefly define staff roles, responsibilities, and qualifications. Provide brief resumes for anticipated key staff. Describe the project team's relationship management practices (e.g., check-ins, feedback loops) to facilitate effective implementation. Include references of key staff as appendixes.

Communication and Leverage

Understanding the structure of the Offeror's organization gives the LEA a sense for how efficiently problems may be resolved and reveals leverage points that the LEA may need to use.

3.8 Organizational History and Qualifications

Provide a brief description of the Offeror's history and organizational qualifications, including noting previous experience implementing similar work in similar districts or schools.

3.9 Budget Model

Provide the detailed costs for project completion using the attached Budget Cost Proposal Sheet (Appendix A). Include a budget narrative to justify the costs in the Budget Cost Proposal.

Provide a Budget Template

Provide Offerors with a budget template to support the comparability of costs across proposals.

3.10 References

Provide a list of at least three client references with the following information:

- » Name
- » Title
- » Organization
- » Email address
- » Phone number
- » Context for reference (i.e., brief description of similar work completed and measured impact)



Section 4: RFP Evaluation

Proposals will be evaluated by a team of representative stakeholders using the scoring criteria designed for the project and outlined below.

4.1 Proposal Evaluation

Proposals will be evaluated by the MCS Evaluation Committee, including the following members:

- » Director of Curriculum and Instruction
- » Middle School Principals
- » Middle School Literacy Coaches
- » Lead English Teachers

Scoring Criteria

Align scoring criteria with the RFP Scope of Work. Criteria may be simple statements or more thoroughly fleshed out. Note specific preferences that will be given additional consideration (e.g., in-state vendors, vendor willingness to have outcomes-based contracting).

4.2 Proposal Scoring Criteria

The MCS Evaluation Committee will use the following criteria to evaluate each proposal. Virtual presentations and written proposals will be scored together according to the following rubric.

Criteria	Possible Points
Extent to which proposed services address problem statement	20
Plan for implementation of services (approach, components, methodology, and timelines/milestones/deliverables)	30
Organizational structure (roles and responsibilities, key staff qualifications)	10
Coordination of resources approach	15
Experience and qualifications of firm and staff, including references/past performance	15
Price reasonableness/competitiveness of proposed fee	10
Outcomes-based contract (OBC) preferences (which include adult and student outcomes)	
–Performance Model: 5 additional points	
–Success Model: 10 additional points	
–Performance & Success Model: 15 additional points	
Additional preferences (section 4.3)	
– 5 additional points	
* Total	

*115 possible points

Scoring Consideration

Depending on the complexity of the Technical and/or Cost proposal, Districts may consider scoring the Technical and Cost proposals separately. Examining each separately may also inform negotiations.

4.3 Preferences

RFPs may be awarded preference in compliance with MSA 1994, §13-1-21 for Montana In State Resident Business, Resident Veteran Business, and the state's women- and minority-owned business programs. Offerors shall include a copy of relevant certificates issued by State of Montana Taxation & Revenue in their proposal. Out of state companies may include applicable similar state-specific certifications (I.e. minority or woman-owned businesses). If the proposal includes a Joint Venture, the Offeror shall state in the submitted offer the percentage of work that will be performed by Resident Business and/or Resident Veteran Business.

Offerors selecting to use an outcomes-based contract (OBC) structure will be given additional preference points. The suggested OBCs must include appropriate student and adult outcomes.

4.4 Oral Presentations/Demonstrations Clarifications

4.4a Right to Use Oral Presentations to Verify/Expand on Proposal

The District's RFP Evaluation Committee reserves the right to request selected finalists to present to the evaluation team June 14–16, 2021 (tentative dates). Finalists will adhere to the provided outline and time limit to present details of the proposed model and approach to addressing the problem statement. If selected as a finalist, the virtual presentation is mandatory. Presentations will be scored by the evaluation team.

4.4b Oral Presentation Evaluation Criteria

Any additional scoring criteria developed for oral presentations will be provided to finalists upon notification of their selection to present.

Section 5: Negotiation

Contractual details are negotiated following District protocols. Non-negotiables identified by the District and the Offeror are addressed.

Section 6: Collusion

By submitting RFP proposals, Offerors certify that their proposals are made absent collusion and fraud and that Offerors have not offered or received any kickbacks or inducements. Offerors have not conferred on any public employee or Board member having official responsibilities for this procurement process any payment, loan, subscription, advance, deposit of money, services, or anything more of nominal value, present or promised. See Appendix C for more information.



Section 7: Employee Background Certification

Provision of services under this contract requires the firm and employees of the firm to have direct contact with students on school property during regular school hours or during school-sponsored activities. Therefore, the MCS School Board requires the firm to provide certification of whether any individual who will provide services has been convicted of any violent felony set forth in the definition of Montana State Code (cite code); any offense involving sexual molestation, physical or sexual abuse or rape of a child, or any crime of moral turpitude. The firm is responsible for submitting evidence of background checks upon District request.

Section 8: Termination

Causes for termination of the agreement may include any of the following: Failure to promptly and faithfully provide the services required at the prices indicated in the proposal; violation of any law governing services provided to the District; failure to cooperate upon receiving any reasonable request for information or service; or improper actions of the officers or employees. The District may terminate the agreement without cause on 90 days' notice. The District may terminate the agreement with cause with 30 days' notice.

Section 9: Insurance

The successful Offeror shall purchase and maintain statutory limits of Worker's Compensation, Public Liability, and Automobile Liability Insurance approved by MCS at the time of contract award. Model City Schools shall be included as a loss payee and/or additional insured. Public Liability and Automobile Liability insurance shall meet established limits of the MCS Board of Education. Before work begins, the Offeror shall furnish MCS with certificates of insurance with the contract documents.



Section 10: General Terms and Conditions

The RFP may include a section for General Terms and Conditions, or these may be addressed in the contract. A bulleted list (non-inclusive) for consideration is below.

- » Access to Records
- » Anti-Discrimination Conformation
- » Audit and Records Retention
- » Availability of Funds (Federal)
- » Compliance with all applicable federal, state, county, and municipal statutes, laws, ordinances, and regulations relating to the contract and the performance of services
- » Change Management Process
- » Confidential Information (including student data)
- » Contract Changes
- » Contractor Employee Background Certification
- » Debarment Status
- » Default
- » Dispute Resolution and Formal Dispute – applicable laws and courts
- » Insurance Requirements
- » Intellectual Property
- » Kickbacks
- » Network Use
- » Non-Disclosure
- » Student Data Use Compliance
- » Family Educational Rights and Privacy Act (FERPA), Protection of Pupil Rights Amendment (PPRA), and Children’s Online Privacy Protection Act (COPPA)
- » W-9 Form (request)



Appendix A. Budget Proposal

General Instructions

The Offeror's response must contain all prices as defined. Provide complete details of your pricing methodology and a justification for costs in the budget narrative.

Budget Item	YEAR 1	YEAR 2
Staff	\$	\$
Instructional Coaches (Quantity ____)	\$	\$
Other Staff	\$	\$
List each position (e.g., Site Lead) with cost	\$	\$
	\$	\$
	\$	\$
	\$	\$
Administrative Expenses	\$	\$
Profit/Overhead	\$	\$
Supplies	\$	\$
Other (Define Cost)	\$	\$
	\$	\$
	\$	\$
	\$	\$
Total Annual Costs	\$	\$
Total Program 2-Year Cost	\$	

BUDGET NARRATIVE (section 3.9) – Please justify the budget request, and include the Offeror's selection of a contract fee structure, with any appropriate detail for the fee structure (i.e., the specified outcomes and performance incentives for outcomes-based contracting. This may be completed on a separate page and submitted as part of section 3.9 (Budget Narrative).



Appendix B. RFP Cover Page



REQUEST FOR PROPOSALS
ISSUED BY THE MODEL CITY SCHOOL BOARD OF EDUCATION

83 Monterey Ave., Whistler, Montana 78901

MIDDLE SCHOOL LANGUAGE ARTS
ADAPTIVE ACCELERATED LEARNING SUPPORT SERVICES
RFP #12345

ISSUE DATE May 10, 2021	RFP NUMBER #12345	TITLE Middle School Language Arts Adaptive Accelerated Learning Support Services
SUBMISSION DUE DATE/TIME June 1, 2021, at 2:00 P.M. (MT)		CONTACT: Preston Varg, pvarg@mcs.edu

Note: Model City Schools does not discriminate against faith-based organizations in accordance with the Montana Code 49-2-203 or against a bidder/Offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment in the performance of its procurement activity.

NAME AND ADDRESS OF FIRM: _____ _____ _____ _____	Telephone Number: (____)_____ Fax Number: (____)_____ Cell Number: (____)_____ Email:_____ MT State Corporation Commission No:_____
---	---

Proposal Acceptance Period: Any proposal submitted in response to this solicitation shall be valid for one hundred eighty (180) days. At the end of the one hundred eighty (180) days the proposal may be withdrawn at the written request of the Offeror/Proposer. If the proposal is not withdrawn at that time, it remains in effect until an award is made or the solicitation is canceled.

In compliance with this Request for Proposal and to all the conditions imposed therein, the undersigned offers and agrees to furnish the Goods/Services at the price(s) submitted in this proposal.

Printed Name and Title of Authorized Representative

Signature (Blue or Black Ink)

Date

Appendix C. Certification of Non-Collusion

The undersigned, acting on behalf of _____, does hereby certify in connection with the preparation and submission of this proposal, we did not directly or indirectly enter into any combination or arrangement with any person, firm or corporation, or enter into any agreement, participate in any collusion, or otherwise take any action in the restraint of free competition in violation of the Sherman Antitrust Act, 15 USCS Sections 1 et seq., or Montana (cite State Code). The undersigned firm certifies that this proposal is not the result of, or affected by, any act of collusion with, or any act of, another person or procurement and bid to which this Certification of No Collusion is attached that:

This bid is not the result of, or affected by, any act of collusion with another person engaged in the same line of business or commerce: nor is this bid the result of, or affected by, any act of fraud punishable under (cite State Code).

Signature of Firm Representative

Name of Company

Date

