



Solicitation Information
29 March 11

Letter of Interest # 7448451

Title: **Curriculum and Evaluation Intermediary Service Providers (ISPs)
Coordinator**

Submission Deadline: 25 April 11 @ 2:30 PM (Eastern Time)

Questions concerning this solicitation must be received by the Division of Purchases at questions@purchasing.ri.gov no later than **11 April 11 at 12:00 Noon (ET)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP / LOI # on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

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Assistant Director for Special Projects

Vendors must register on-line at the State Purchasing Website at
www.purchasing.ri.gov

Note to Vendors:

Offers received without the entire completed three-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

REQUEST for LETTERS of INTEREST
Curriculum and Evaluation Intermediary Service Providers (ISPs)
Coordinator

The Rhode Island Department of Administration, Office of Purchases, on behalf of the Rhode Island Department of Education (RIDE) is requesting Letters of Interest from qualified vendors to act as a state fiscal agent to provide fiscal and coordination services for the *Building a Strong Foundation (BSF)* Curriculum and Standards Program Curriculum Intermediary Service Providers (ISPs) and as a local fiscal agent to provide fiscal agent and coordination services for the Evaluation ISPs, in accordance with the terms of this solicitation, and the State's General Conditions of Purchase (available at www.purchasing.ri.gov).

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

Potential offerors are advised to review all sections of this Request carefully, and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content, shall be borne by the offeror. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

Proposals misdirected to other State locations or which are otherwise not present in the Division of Purchases at the time of opening for any cause will be determined to be late and may not be considered. The "Official" time clock is in the reception area of the Division of Purchases.

In accordance with Title 7, Chapter 1.1 of the General Laws of Rhode Island, no foreign corporation shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This will be a requirement only of the successful bidder(s).*

Offerors are advised that all materials submitted to the State of Rhode Island for consideration in response to this Request for Proposals will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws.

Also, Submitters should be aware of the State's MBE requirements, which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, contact the State MBE Administrator at (401) 574-8253 or cnewton@gw.doa.state.ri.us Visit the website <http://www.mbe.ri.gov>

Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this LOI.

Equal Employment Opportunity (RIGL 28-5.1)

§ 28-5.1-1 Declaration of policy. – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via email raymond1@gw.doa.state.ri.us

Subcontracts are permitted, provided that their use is clearly indicated in the offeror's proposal, and the subcontractor(s) proposed to be used are identified in the proposal.

BACKGROUND/OVERVIEW

RIDE has significant work in order to support the mission of Race to the Top and the Strategic Plan. First, over 140 sessions of Study of Common Core State Standards will take place. Curriculum ISPs will be trained and then deliver these sessions from Spring 2011 to Fall/Early Winter 2012. This work is separate from other district initiated sessions and will be scheduled by RIDE. Curriculum work will be done with six new district cohorts over the course of the Race to the Top grant, some of which will be facilitated by Curriculum ISPs.

Another piece supporting RIDE's Strategic Plan, Transforming Education in Rhode Island, is the creation of the development of educator evaluation systems. All Educator Evaluation systems must meet RI Regents' regulations passed in December 2009. Rhode Island's Race to the Top application outlines the use of Evaluation ISPs to support evaluation system implementation. These Evaluation ISPs will be trained and will then aid districts in implementing the new educator evaluation process (e.g., working within the districts as complementary evaluators, providing training for district staff on the new evaluation system and process, etc.). Evaluation ISPs may be working with one district or several depending on the support and training needs across the state.

In order for this process to be successful, RIDE is searching for an organization to become the fiscal agent and logistical coordinator for the Curriculum ISPs and the Evaluation ISPs. Due to the nature of the work and its funding sources, non-profit organizations that are not local education agencies are encouraged to apply. RIDE itself has limited capacity to manage a project of this scope, and in the interest of creating statewide partnerships, has posted this LOI to address this critical need.

SCOPE OF THE WORK

Tasks / Deliverables

The organization which is awarded this contract will efficiently and effectively manage the resources necessary to support the implementation of this work. The responsibilities entail:

- Responsible fiscal management: ensuring that paperwork is properly processed for ISP stipends (“payroll”), collecting district/LEA payments (e.g., session fees, ISP fees), binder purchasing, materials purchasing, and documenting hours of the coordinator(s), support staff, and/or finance specialist for salary/stipend purposes.
- Quarterly fiscal reporting to RIDE for each project: including (but not limited to) hours documented, binders/materials purchased/distributed, (template will be sent by RIDE with information needed).
- Materials coordination involves:
 - o Maintaining accurate records and lists to track of the number of binders both in stock and being sent to sessions (overall and per session), as well as the materials used and replaced.
 - o Contracting with a printer to print binders (and other materials) for Curriculum ISP sessions.
 - o Copying/printing additional forms and templates used as part of the evaluation system.
 - o Providing containers to transport the materials, as necessary (e.g., cardboard boxes, packing tape, bags, etc.).
 - o Maintaining a reference library of applicable materials for ISP use – further details found in Curriculum ISPs Responsibilities section.
 - o Please see the “Expected Purchases” subsections under each ‘Responsibilities’ section for further detail.
- Establishing a clear and efficient method of communicating with RIDE, ISPs, districts, and other stakeholders. This includes (but is not limited to):
 - o Creating and maintaining a web page(s) for the dissemination of appropriate information and to facilitate scheduling.
 - o Designating a contact person(s) at the organization for each/both piece(s) of this project.

- A protocol for ISPs to communicate with the organization (e.g., scheduling and availability, questions about payroll, communicating last-minute ISP issues regarding sessions).
- A protocol for ISP materials pickups and returns – *please note that same-day pick-up for Curriculum ISPs is not allowed due to time constraints and the early start time for their sessions.*
- A protocol for organization to communicate with ISPs (e.g., scheduling sessions and materials pickups, last-minute session changes).
- A protocol for organization to communicate with districts (and vice versa) (e.g., scheduling sessions, gathering/sending information needed to schedule sessions and assign ISPs).
- A protocol for organization to communicate with RIDE regarding questions or issues that arise in relation to either piece of this project.
- A protocol for scheduling sessions for the Curriculum piece and a protocol for scheduling sessions for the Evaluation piece.
- Performing the responsibilities listed under the Curriculum ISPs section and the Evaluation ISPs section (growth of the program may lead to modification and/or extension of the contract).

Responsibilities: Curriculum ISPs (State contract)

Pre-Session Responsibilities:

- Negotiating a contract with a printing agency for the printing and assembly of the binders.
- If needed, completing paperwork with the Dana Center to ensure payment of the copyright fee for the binders. This fee is included in the session fee for the districts, which upon receipt will reimburse the entity for the copyright fee expenses.
- Purchasing supplementary materials for use in the sessions. Materials can be stored or picked up in a variety of ways: Curriculum ISPs bring their own bags and fill as needed, the entity fills bags with the maximum amount of materials needed for a session, and then refills them accordingly once Curriculum ISPs return the bags, etc. (see “Expected Purchases” section below).
- Maintaining a reference library of applicable materials for ISP use. Materials include (but not limited to): standards documents (digital and paper copies), publications, reference copies of ISP facilitation binders, other program materials determined necessary for the Curriculum ISP facilitation. Please note: the reference library is not expected to require a sizeable funding amount.
- Contacting the Curriculum ISPs and having them fill out the appropriate paperwork in order to be able to invoice and receive payment from the entity.
 - Curriculum ISP training and paid at rates determined by RIDE.

- o Curriculum ISPs always present/facilitate in pairs, but will send invoices separately.
- Designating a point person at the entity to communicate with RIDE about any questions or issues that arise. This person will also be in charge of ensuring that the binders and materials are stocked and ready for the Curriculum ISPs to come pick up. If necessary, this can be a part-time person hired specifically for this, and that stipend should be included in the proposal.

Common Core State Standards (CCSS) Study of Standards Sessions:

- Entity will receive dates, times and locations of Study of Standards sessions directly from RIDE
- Curriculum ISPs will be assigned, largely for purposes of training, by RIDE in an equitable manner.
- Curriculum ISP training sessions will be paid by RIDE through Race to the Top funds (included as a set fee within the contract); Curriculum ISP facilitated sessions will also be paid by districts from the LEA portion of Race to the Top funds.
- Entity will also be responsible for payment of invoices for session locations or other meeting expenses, as necessary.
- Binders and session materials must be delivered to site of sessions **at least** one day in advance of session by either the entity or ISP upon mutual prior agreement
- The CCSS Study the Standards piece is budgeted for \$2500 per session (ISP stipends), plus materials as indicated below. Total estimated per year is listed in the "Reserved for Curriculum ISP Stipends" column in the Cost Proposal section.

Session Request Procedure (District-Initiated Only):

- Districts will be able to contract for Study of the Standards sessions independent of RTTT funding. A process for this contract will be determined by mutual agreement between RIDE and the entity. All contractual work will, however, need to be with the knowledge and approval of RIDE. See above for
- Each session for this piece has a \$3,200 fee, paid by the district. The \$3,000 is broken down as follows: \$2500 for Curriculum ISP stipends, \$700 to the entity for materials costs (e.g., binders, additional supplies). Please note: these fees/expenses should not be included in the cost proposal for this LOI since the costs for the sessions are paid by the districts, not by RIDE.

Expected Purchases: Materials, Copying, Printing

- Each session (regardless of protocol/topic) will have a maximum of 35 participants.
- At minimum 114 CCSS Study the Standards sessions will be done in the first two fiscal years. At least 4025 binders will be needed for this piece alone.

- Binders vary in content by protocol but must have a uniform look and feel specifics to be determined by RIDE
- Binder printing and assembly may be included in the contract with the printing company.
- Material containers are needed to begin work. Containers include but are not limited to supplies such as highlighters, self-stick pads, pens, etc. Amounts and types to be determined by RIDE. Large (over 40 per) batches of additional forms, handouts, or other materials may also need to be copied for sessions or for information distribution.

Other Information

- Curriculum ISPs will be responsible for sending in their invoices on a monthly basis using a standard template (provided to the entity and ISPs by RIDE)
- Curriculum ISPs are responsible for picking up and bringing binders and materials to their sessions. Delivery via courier or other service will only be necessary upon RIDE request. Entity will be responsible for creation of a system to keep track of materials and binders.

Responsibilities for Evaluation ISPs (State master price agreement for locals to access)

- The process and procedure for logistics concerning the Evaluation ISPs will have the same basic elements as that of the Curriculum ISPs but will need to be tracked separately.
- Negotiating a contract with a printing agency in order to maintain an adequate supply of all materials (e.g., printed materials, handouts, forms).
- Purchasing supplementary session and support materials for use by Evaluation ISPs to support training sessions and evaluation work (see "Expected Purchases" section below).
- Contacting Evaluation ISPs to ensure the timely completion of paperwork and invoices in order to receive payment from the entity.
- Designating a point person at the entity to communicate with RIDE about questions and issues. This person will also ensure that binders and other materials are ready for ISPs. This can be a part-time person and should be included in this proposal.
- Evaluation ISPs will be assigned by RIDE in an equitable manner on an as-needed basis.
- The entity will pay Evaluation ISP stipends in accordance with a procedure to be drafted by RIDE. Evaluation ISPs will not only be facilitating training sessions, but also working within districts at specific times throughout the year, and as such may have a slightly different stipend schedule than Curriculum ISPs (who primarily work in full-day blocks). Total estimated per year is listed in the "Reserved for Evaluation ISP Stipends" column in the "Cost Proposal" section.
- The entity will receive RIDE's training schedule and other related information.

Evaluation Session or Support Requests

For the most part, training sessions and support services will be pre-determined and on a schedule coordinated with RIDE and LEAs. However, a district may initiate a request by following the following steps:

- LEA submits a training session or support request to RIDE
- RIDE will determine if any Evaluation ISPs are available and assign at least 1 Evaluation ISP to the district based on its needs. Confirmation will be sent to the district and to the contract entity.
- The entity will then follow up on all fiscal responsibilities and materials responsibilities needed for this assignment.
- If the entity does not have sufficient materials at the time, it must contact the printing company to ensure adequate materials are available for the Evaluation ISP.
- Invoices will be sent once training sessions or services have been provided.

Expected Purchases: Materials, Copying, Printing

- Copying/printing of forms and templates used as part of the evaluation system.
- Materials may include (but not be limited to): different colored and different sized post-it packets, different colored index cards, pens, highlighters, flip-chart markers, tape (masking, double-sided, invisible), and flip-charts.
- Binders for district reference and training sessions, containing guidance materials, will also need to be printed and assembled.
- Other materials may be required

Project Schedule

Work on this project will take place year-round. Curriculum ISP work will take place throughout the school year and the summer; Evaluation ISP support work will primarily take place during the school year, but trainings will occur during the school year and the summer.

ADDITIONAL CONTRACTOR REQUIREMENTS/QUALIFICATIONS

- **Proven Experience:** Demonstrate a successful history of responsible coordination and fiscal management of projects with (at a minimum) the same scope and responsibilities as outlined in this LOI.
- **Full Support** for the Race to the Top program, methods, and the partnership between RIDE, the school districts, and other stakeholders; full support for RI's educator evaluation system and its work with districts in this area: The importance of a single message being sent to the field and full support for this project is integral to the success of the work taking place and planned for the future. Applying for this Contract indicates the organization's commitment to work at RIDE's direction.

- **Staff Capacity:** Have the staff capacity to fulfill the logistical duties or else be willing hire part-time staff as needed (when applying, please include this expense in cost proposal).
- **Fiscal Capacity:** Have a fiscal staff member with a proven track record for responsible budget management. This staff member will be responsible for keeping track of expenditures and revenues that cover certain expenditures (e.g., district session fees applying to the ISP stipends and materials costs for the session; Race to the Top funds used and tracked in accordance with federal regulations).
- **Dedication:** Willing to make a long-term commitment (e.g., at a minimum, the duration of the Race to the Top funding for this project) starting in or around March 2011 to all the responsibilities listed below, with the understanding that over time growth of the program may lead to modification and/or extension of the contract.

TERMS OF THE CONTRACT

The state contract for curriculum ISP work will begin **upon issuance of a state purchase order (on or about late May 2011)** and end **June 30, 2013**. The state MPA for locals to access for evaluation ISP work will begin **upon issuance of a state purchase order (on or about late May 2011)** and end **June 30, 2012**. The scope of the work may be modified by RIDE prior to beginning work on a given task. RIDE retains the option of granting a time extension of up to **12 months** with additional funding if available and if the level of work is expanded by mutual written consent. This award will result in two separate purchase orders: one will be between the state and the selected vendor for the curriculum ISP work; the other will be a state master price agreement that local education agencies will be able to access to contract directly with the selected vendor for the evaluation ISP work.

COST PROPOSAL/TERMS OF PAYMENT

The contractor must prepare two cost proposals, one for the curriculum ISP work and one for the evaluation ISP work, reflecting the hourly rate or other fee structure proposed for this scope of services. These are two distinct bodies of work, one funded by the state allocation of Race to the Top and one funded by the local allocation of Race to the top; however, since the work is similar, the LOI has been combined to ensure economies of scale. RIDE reserves the option of awarding this work to multiple vendors. Cost proposals must fall within the range below for each period as follows:

Cost Proposal #1 – Curriculum ISP

The total cost of the state contract for curriculum ISP work is not to exceed **\$797,150**, using the budget guidelines provided below. The state contract must provide direct costs using the Cost Proposal Forms contained in Appendix A. **Please ensure the budget is presented by state fiscal year, which runs from July 1st through June 30th.**

FY 2011	Costs to be incurred through June 30, 2011
FY 2012	July 1, 2011 through June 30, 2012
FY 2013	July 1, 2012 through June 30, 2013

Curriculum ISPs:

FY	Maximum per FY	Minimum for Curriculum ISP Stipends	Balance for Materials, Administrative Costs, etc.
FY 11	\$247,400	\$142,500	\$104,900
FY 12	\$464,750	\$384,750	\$ 80,000
FY 13	\$85,000	\$75,000	\$10,000

ISP stipend amounts should be included as other expenses in the budget pages.

Cost Proposal #2 – Evaluation ISP

The total cost of local contracts for evaluation ISP work is not to exceed **\$3,264,455**. Since this portion of the work will be funded locally, this cost proposal should be presented in an hourly or per session format that includes any administrative charges. Potential bidders can use \$500/day for the services of the ISP (includes delivering training, assisting principals and schools, and other implementation needs). Administrative charges should be added to this rate using a daily rate. As noted, this information will be used to create a master price agreement that local educational agencies will be required to access. This is a statewide RFP to select one vendor that will administer this work for all locals.

Evaluation ISPs:

FY	Maximum per FY	Minimum for Evaluation ISP Stipends	Balance for Materials, Administrative Costs, etc.
FY 11	\$580,000	\$452,000	\$128,000
FY 12	\$2,684,455	\$2,389,699	\$294,756
FY 13	n/a	n/a	n/a

**Maximum administrative costs for both budgets must not exceed ten percent per fiscal year. **

PROPOSAL SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at questions@purchasing.ri.gov no later than the date & time listed on the cover sheet of this solicitation. **Send your questions in Microsoft Word format.** Please reference the LOI # on all correspondence. Questions received, if any, will be posted and answered on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. For computer technical assistance, call the helpdesk at 401-222-2142, ext. 134.

Proposals (an original plus 4 copies) should include the following:

1. A completed and signed three-page RIVIP Bidder Certification Cover Form, available at www.purchasing.ri.gov.
2. A Cost Proposal as described above.
3. A *separate* Technical Proposal (see below) describing the qualifications and background of the applicant and experience with similar programs, as well as the work plan or approach proposed for this requirement.

4. A completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at www.purchasing.ri.gov.
5. In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in electronic format (CDRom , diskette, or flash drive). Microsoft Word / Excel OR PDF format is preferable. Only 1 electronic copy is requested and it should be placed in the proposal marked "original".

Deliver to: Department of Administration
Office of Purchases
One Capitol Hill
Providence, Rhode Island 02908

Contractor assumes all responsibilities for proposals submitted by mail or commercial delivery service. Proposals misdirected to other state locations or which are otherwise not present in the Office of Purchases at the time of opening, for any cause, will be determined to be late and will not be considered. Faxed responses will not be considered.

TECHNICAL PROPOSAL REQUIRED ELEMENTS

- | | |
|---|-------------|
| 1. Contractor understanding of the Issues | (10 points) |
| 2. Work Plan | (25 points) |
| 3. Capacity of the Agency Effectively to Administer the Project | (25 points) |
| 4. Quality of Key Personnel (including Curriculum vitae) | (20 points) |
| 5. Cost Proposal | (20 points) |

A Selection Committee will evaluate submitted proposals on the basis of the above criteria items. Consultant Teams may be invited to appear before the Committee for in-person presentations. The Committee will then make a qualifications based recommendation for final selection to the Rhode Island State Purchasing Agent, or her designee, who will make the final award decision.

Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all responses, and to award in its best interest.

Responses found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further. The State reserves the right to reject any or all responses submitted and to waive any informalities in any vendor's submission

APPENDIX A

BUDGET Multi-Year Projects

The Contractor estimates that its budget for work to be performed under this Agreement is as follows:

<u>Expense Category</u>	<u>Estimated Expenditures</u>		
	Year 1	Year 2	Year 3
1. Salary and Fringe Benefits	0	0	0
2. Fringe Benefits	0	0	0
3. Consultant	0	0	0
4. In-State Travel	0	0	0
5. Out-of-State Travel	0	0	0
6. Printing	0	0	0
7. Office Expense	0	0	0
8. Telephone	0	0	0
9. Educational Materials	0	0	0
10. Equipment	0	0	0
11. Data Processing	0	0	0
12. Rental	0	0	0
13. Other – Participant Stipends	0	0	0
14.	0	0	0
15.	0	0	0
16.	0	0	0
17.	0	0	0
Subtotal	0	0	0
Indirect Cost	0	0	0
TOTAL	0	0	0

It is understood and agreed that the amounts indicated above for the several line items are estimates of expenditures to be incurred by the Contractor on behalf of this Agreement and to be claimed by the Contractor for reimbursement under this Agreement. It is further understood and agreed that actual expenditures may vary from the estimates set forth above and that such variations shall not in themselves be cause for disallowance of reimbursement by RIDE; provided, however, that the Contractor shall notify and obtain the approval of the contract officer, in writing, if expenditures to be claimed for reimbursement in any line item above shall begin to vary significantly from the estimate given above; and provided further that unless permission of the contract officer shall have been obtained in advance, no expenditure shall be claimed by the Contractor for reimbursement by RIDE under this Agreement if such expenditure shall have been incurred in a line item category not listed above. Transfer of funds is permitted between Expense Categories (1) (2) and (3) up to 10% or \$25,000, whichever is less; all other transfers require prior written approval by the Department of Education.

BUDGET DETAIL SHEET
 FISCAL YEAR _____

SALARY AND FRINGE BENEFIT DETAIL

NAME	POSITION TITLE	HOURLY RATE \$	NUMBER OF HOURS	TOTAL SALARY \$	FRINGE BENEFITS \$	HOURLY RATE WITH FRINGE BENEFITS \$	SALARY & FRINGE TOTAL \$
TOTAL REQUEST							

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$	NUMBER OF HOURS	TOTAL COST \$
TOTAL REQUEST				\$

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST