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REQUEST FOR PROPOSALS FOR
DEVELOPMENT AND DELIVERY OF RESOURCES AND SERVICES
TO SUPPORT PROFESSIONAL LEARNING ACTIVITIES FOR
LOCAL EDUCATIONAL AGENCIES

ISSUED BY:

The California Collaborative for Educational Excellence (CCEE)
and the Marin County Office of Education (MCOE),
Administrative Agent for the CCEE

ISSUED ON:

Friday, March 24, 2023

REVIEW OF PROPOSALS BEGINS:

Monday, May 1, 2023

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The California Collaborative for Educational Excellence (“CCEE”) and the Marin County Office of Education (“MCOE”) invite qualified organizations (“Respondents”) to submit proposals (“Proposals”) in response to this Request for Proposals (“RFP”). Proposals shall comply with the requirements set forth herein. The CCEE/MCOE is not required by law to use an RFP process but has elected to do so for the particular services described herein in order to seek qualified parties who meet the unique service needs of the CCEE.

I. Timelines

Activity	Date
Release of Request for Proposals	Friday, March 24, 2023
Respondent’s Conference	Thursday, April 6, 2023 at 10:00 a.m. PST Registration link
Deadline for Submission of Questions	Wednesday, April 12, 2023 at 4:00 p.m. PST
Review of Proposals Begins	Monday, May 1, 2023
Proposals Accepted Through	Monday, October 30, 2023 at 4:00 p.m. PST
Work to begin no earlier than:	Monday, July 3, 2023
Duration of Services	Through June 30, 2024
<i>Note: All dates are preliminary and subject to change.</i>	

II. Purpose

To secure a project team(s) to provide services to support the identification, review, development, delivery, and measurement of the impact of professional learning resources and services to build capacity for improving student outcomes and support high priority needs for California local educational agencies (“LEAs”).

III. Background and Context

CCEE was created to “advise and assist” LEAs with achieving the goals set forth in their Local Control and Accountability Plans (“LCAPs”). (Ed. Code § 52074.) In coordination with California’s State System of Support, and in alignment with its Theory of Action, CCEE helps to build the capacity of LEAs to support the continuous improvement of pupil performance, address the achievement gaps between pupil subgroups, and improve outreach and collaboration with stakeholders to ensure that LCAPs reflect the needs of pupils and the community, especially for historically underrepresented or low-achieving populations. (Ed. Code § 52059.)

Pursuant to Statutes 2020, Chapter 10, Sec. 8 (AB 86), effective March 5, 2021, the California Legislature has allocated funds to the CCEE for the purpose of providing support to LEAs to

maximize positive pupil outcomes in accordance with subdivision (b) of Section 43521 of the Education Code. CCEE is, therefore, looking to identify contractors to provide professional learning resources and services aligned with its Theory of Action and areas of focus as described in this RFP under Section IV. Scope of Services.

The professional learning resources and services may be requested by the CCEE to be made openly available or offered to selected participants, depending on the particular resources and needs identified by the CCEE. Selected participants could include LEAs that are currently engaged in activities facilitated by the CCEE, LEAs that will be engaging in activities facilitated by the CCEE in the near future, or LEAs that have requested support from CCEE.

CCEE will begin accepting Proposals on May 1, 2023, and will continue to accept Proposals until October 30, 2023, at 4:00 p.m. (Pacific Standard Time). While CCEE will begin reviewing Proposals submitted by this deadline, Proposals may be submitted after the deadline, and, at its discretion, CCEE may review those Proposals as needed for this RFP or future professional learning service needs, which work may commence after the date identified in the timeline above. Regardless of the timing of submitting a Proposal, CCEE may reach out to Respondents at any time CCEE determines that it has a need for the resources and/or services proposed.

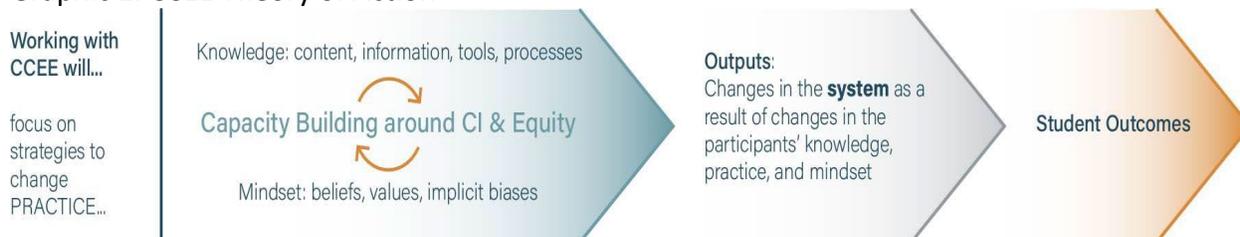
CCEE Theory of Action

As shown in the graphic below, CCEE’s Theory of Action is predicated on its fundamental charge to build capacity at the local level to implement systemic changes that improve student outcomes, especially for historically underrepresented, under-served, or low-achieving student groups.

CCEE has anchored its capacity-building around two key concepts central to the work of CCEE: (1) the implementation of continuous improvement processes, and (2) the examination of equity as it relates to decision-making and shaping student outcomes. CCEE has further defined its work around capacity-building to include changes in knowledge, information, tools, and processes as well as the changes in beliefs, values, and implicit biases that impact individual- and systems-level decisions that ultimately shape instructional practice.

Ultimately, the question that shapes CCEE’s work is being able to address, “How does working with CCEE change partners’ knowledge, practice, and mindset around the impact that implementing continuous improvement processes with an equity-oriented perspective has on outcomes for their students?”

Graphic 1. CCEE Theory of Action



More information about CCEE’s Theory of Action can be found at: <https://ccee-ca.org/theory-of-action/>.

IV. Scope of Services

CCEE is seeking submissions of professional learning resources and services related to the topics outlined in Section IV.B., Content Areas, of this RFP. The proposed professional learning opportunities should aim to build LEAs' capacity to support student instruction and outcomes.

CCEE's professional learning work is anchored in its Theory of Action as described in the above section. In addition to its Theory of Action, CCEE applies its Quality, Relevance, and Usability Rubric ("QRU Rubric") to all identification, development, dissemination, and evaluation of its work. The QRU Rubric is used to assess resources, practices, and supports on three metrics:

- Quality (Q)—Is the tool/resource based on research, evidence, and/or best practice? Is it focused on outcomes and does it provide measurable results?
- Relevance (R)—Does it provide specific guidance and supports for the identified user?
- Usability (U)—Is it immediately usable without requiring time- or effort-consuming adaptations to be effective and applicable?

Respondents must describe how their resources and approach are aligned with CCEE's Theory of Action focused on capacity building and the QRU Rubric, which measures whether resources are evidence-based, specific to user/context, and immediately usable. In addition, Respondents must provide evidence of how their resources and approach have previously demonstrated growth and improvement by participants.

In addition to the above, Respondents must include the following components in their Proposal:

A. Method of Delivery

Respondents must describe their proposed method(s) of delivery when developing their Proposal for the development and implementation of professional learning supports. Delivery methods may be proposed as an individual project or as a combination of delivery methods. For example, a Proposal may describe a stand-alone training manual to be downloaded from a website or team and individual coaching sessions, or a Proposal may describe a combination of training materials, a professional learning series, and follow up coaching. Respondents should include evidence of how their methods have previously demonstrated growth and improvement in building capacity. Methods of delivery may include:

- **Development of resources and tools** to support professional learning, including but not limited to professional learning and training materials, documents, videos, and facilitation guides that will be utilized by CCEE and hosted on the CCEE website and can be accessed asynchronously.
- **Development and delivery of professional learning sessions** to a variety of audiences, depending on the topic and area of focus of the professional learning session. CCEE is primarily interested in Proposals that describe multi-session, sustained engagement opportunities focusing on interactive learning to support capacity-building and student-centered instructional practice for a targeted audience(s) rather than single-instance training or informational sessions.

- **Tailored consultation and coaching supports** to support LEA teams in furthering their learning and support implementation within their local contexts. This method of delivery will likely accompany one or more of the methods identified above, to provide deeper, individualized supports for LEA teams as they implement and refine their instructional practices over a sustained period of time.
- **Expert-led “office hours”** to support LEA teams and individuals and address specific discovery, development, implementation, and/or evaluation challenges that may fall outside of issues that can be addressed during professional learning sessions or consultation/coaching opportunities. These opportunities may be requested by CCEE to support individual or general LEA needs and may be offered as “standalone” engagement opportunities for LEA teams/individuals to ask questions around a specific issue affecting discovery, development, implementation and/or evaluation.
- **Other research-based, relevant methods of delivery grounded in effective instructional design.**

B. Content Areas

To support rigorous, student-centered teaching and learning that includes the design and delivery of inclusive, equity-based instructional practices, CCEE is requesting Proposals that address one or more content areas or topics as outlined below. Content areas to support instruction may include, but are not limited to:

Systems Leadership

- Supporting strategies and resources to drive systems-driven leadership

Whole Child Design

- Developing and delivering instructional supports to ensure that students thrive both socio-emotionally and academically

Summer and Expanded Learning

- Developing resources to support the identification and implementation of effective summer/expanded learning programs for students
- Tools and supports to evaluate the impact of summer/expanded learning programs on student outcomes

Learning Acceleration

- Expanding instructional strategies to accelerate learning in rigorous grade-level content for all students

Effective Assessment

- Measuring student needs and progress to ensure educating and supporting diverse student needs
- Balancing across assessment types, including summative, interim, and formative assessments

Formative Assessment Practices

- Identifying needs and assessing readiness
- Introducing formative assessment practices for various levels/student groups

- Evaluating efficacy

Database Development and Support

- Developing and implementing databases including the secure transfer of files, stitching of files, and transformation of data from both publicly available data sources and locally maintained data sources
- Programming, including no-code, low-code, and high-code environments (e.g., PowerBI, Tableau, R, Knime, SQL, etc.)

Data Visualization

- Designing data profiles, infographics, and dashboards using publicly available data sources and locally maintained data sources
- Using effective data visualizations to support local decision-making
- Ability to respond to ad hoc data visualization requests

All proposed professional learning should address implementation, use, and/or practice of the content.

All Proposals must include the learning objectives of each resource proposed to be developed/delivered, and how each objective will be measured, including examples from previous successes. To the extent practicable, objectives should be linked to building the capacity of LEAs and improving student academic, engagement, and social-emotional learning outcomes.

To support LEAs, Proposals must also address high priority needs linked to improving student outcomes, including, but not limited to, identifying and addressing achievement gaps between student groups, improving outreach and collaboration with stakeholders to ensure that instructional plans reflect student and community needs, and/or implementation of continuous improvement processes to address any of the above, especially for historically underserved student groups and communities.

CCEE is issuing this RFP to invite Respondents to respond to one or more of the Content Areas and Methods of Delivery described above.

Each selected Respondent will be expected to work closely with, and under the supervision of, assigned CCEE project staff to complete each of the activities described in the Proposal, including the identification, review, development, and delivery of the professional learning resources and services.

Respondents may also refer to California Standards for the Teaching Profession (CSTP) and the California Professional Standards for Educational Leaders (CPSEL) for additional information in writing their Proposal.

V. General Proposal Information

A. Respondents' Eligibility

Sole proprietorships, partnerships, and public or private agencies may submit Proposals in response to this RFP. The Respondent must be legally constituted and qualified to do

business within the State of California.

The Respondent responding to this RFP must serve as the Prime Contractor and will be the responsible entity in ensuring that all tasks and activities are successfully completed.

B. Minimum Qualifications for Respondents

Respondents must have a minimum of five years of recent (within the last seven years) experience in developing and delivering professional learning resources, tools, and sessions to support instructional practice and leadership. Respondents must have a minimum of five years of recent (within the last seven years) experience working within the California educational context and have familiarity with key California education policy and accountability systems.

Please see Section VI.E., Qualifications of Respondent Personnel, for additional information pertaining to personnel requirements.

C. Questions and Clarifications

Respondents may submit questions and requests for clarifications or additional information regarding this RFP, in writing only, to Dorcas Kong (the “CCEE Contact”) at dkong@ccee-ca.org. Questions and requests for clarifications may be submitted at any time up to Wednesday, April 12, 2023 at 4:00 p.m. (Pacific Standard Time).

CCEE will endeavor to provide responses and clarifications via CCEE’s website at ccee-ca.org by Wednesday, April 19, 2023. At its discretion, the CCEE may respond to questions that are submitted late or not in proper form. The CCEE reserves the right to rephrase or not answer any question or inquiry submitted, regardless of timing or form of the question. Respondents are solely responsible for monitoring any questions or answers posted on the CCEE’s website and incorporating any answer or information provided by CCEE into their Proposals. Respondents shall not contact any other CCEE or MCOE employee or agent regarding this RFP except for the CCEE Contact identified above.

VI. Proposal Specifications/Requirements for Submittal

Each Respondent must submit a Proposal that contains all of the required items listed in this section. Any Proposal that does not include all required items may be disqualified from consideration, but the CCEE reserves the right to consider Proposals that do not meet all the requirements, at CCEE’s sole discretion. Proposals should be no longer than 15 pages, excluding curricula vitarum of identified personnel. Proposals can utilize tables and/or bullets to more clearly communicate main ideas and flow of work.

A. Cover Letter (2 page maximum)

B. Scope of Project

All tasks and subtasks outlined in Section IV, Scope of Services must be addressed in each Proposal.

Proposals must also include a description of Respondent’s proposed work plan to accomplish the tasks described in the above-referenced Scope of Services. The work plan shall include a timeline, time estimates for each significant segment of the work, the number of staff to be assigned, the level of each of the staff members to be assigned, and any specialists or subcontractors who will be assigned. For scopes of work including the delivery of professional learning sessions, consultation/coaching supports, and/or expert-led office hours, the description should include an estimate of the time and timing of the availability of these services for a typical school year (i.e., the minimum and maximum number of sessions/hours per delivery method).

C. Description of Respondent Organization (1 page maximum)

Include the name and contact information for your organization (address, telephone number, fax number), as well as the name and contact information (telephone number and email address) of the principal contact for your Proposal. Provide a brief history of the organization, including:

- Number of years in business/practice
- Senior member(s) and length of association
- Whether the organization may have been known by a different name while under substantially the same management
- Location of office where project team members will design and oversee the professional learning services
- List of basic services generally provided by the organization and how these services have previously demonstrated growth and improvement in building capacity.

D. Organizational Capacity and Previous Experience (2 page maximum)

Proposals must describe and demonstrate the Respondent’s capacity and ability to perform and administer all activities related to the professional learning activities they are proposing in the Scope of Services. This includes a demonstration of the Respondent’s experience in developing and delivering professional learning sessions addressing the areas of focus identified in the Scope of Services. The Proposal must establish that Respondent meets the eligibility requirements set forth under Section V.A., Respondents’ Eligibility.

Proposals must also reflect the Respondent’s understanding of California education policies, especially those associated with the Local Control Funding Formula (“LCFF”), the California School Dashboard, the Statewide System of Support, as well as broader education policy and research as it relates to the work outlined in this RFP.

If the Respondent will be subcontracting a portion of the work, the Proposal must describe and demonstrate the subcontractor’s capacity and ability to perform the portion of the work in which the subcontractor will be involved. The Proposal must establish that all proposed subcontractors meet the eligibility requirements set forth under Section V.A., Respondents’ Eligibility.

E. Qualifications of Respondent Personnel (2 pages maximum, including Organization Chart)

Please include the name of all individuals proposed by the Respondent organization to perform the duties described in the proposed Scope of Services, including the qualifications of each individual and what each individual would be doing. Current curricula vitarum for all individuals must be included as attachments to the submitted Proposal and will not be counted in the page limits.

E.1. Project Lead

Proposals must identify a dedicated Project Lead by name and include descriptions of how the proposed Project Lead meets the qualifications described herein. The Proposal must describe how the Project Lead will effectively coordinate, manage, and monitor the efforts of assigned staff, including subcontractors and/or consultants, to ensure that all tasks, activities and functions are completed in an effective and timely manner.

The Project Lead will serve as the primary contact for the CCEE and will be expected to provide regular updates and ongoing communications with identified CCEE staff.

E.2. Changes to Key Personnel

Once a Respondent is selected, the assigned project personnel, including the Project Lead, cannot be changed or substituted without the CCEE's prior written approval. Any proposed substitute personnel shall meet or exceed the qualifications and experience level of the previously assigned project staff/personnel.

E.3. Subcontracts

A subcontract is defined as any and all agreements between a Respondent and another entity, individual, or business, for the accomplishment of any task, or component of a task, in whole or part, described in this RFP or the Proposal. All work assigned to subcontractors remains the responsibility of the selected Respondent. For each proposed subcontractor, the Respondent must include a:

- a. Description of the activities and functions that will be performed by the subcontractor/consultant;
- b. Brief explanation as to why the subcontractor was selected; and
- c. Curricula vitarum for each consultant or personnel of a subcontractor who will be assigned to the project.

E.4. Organization Chart

An organization chart for the Respondent, including organizational titles, project roles, and names.

F. Conflict of Interest

Please disclose any past or current business or other relationship(s) with the CCEE, CCEE Governing Board members, CCEE employees, or MCOE.

G. Costs and Fees (1 page maximum)

Provide an annual detailed breakdown of the proposed fees and costs for the activities described in the Proposal. Depending on the method of delivery described, include the following:

Method of Delivery	Breakdown of proposed fees and costs to include:
Development of resources and tools	<ul style="list-style-type: none"> ● Cost to complete proposed resource/tool ● Fee structure (e.g., hourly rate, deliverable) for revisions to resources and tools ● Any additional relevant fees/costs
Development and delivery of professional learning sessions	<ul style="list-style-type: none"> ● Cost to complete development of professional learning sessions and accompanying materials ● Fee structure (e.g., hourly rate, deliverable) for revisions to sessions, resources and tools ● Fee structure for delivery of professional learning, including any required threshold of hours (i.e. min/max hours available) ● Any additional relevant fees/costs
Tailored consultation and coaching supports	<ul style="list-style-type: none"> ● Fee structure for providing tailored consultation or coaching supports, including any required threshold of hours (i.e. min/max hours available) ● Fee variations for individual consultation/coaching vs. team-based consultation/coaching ● Any additional relevant fees costs
Expert-led office hours	<ul style="list-style-type: none"> ● Fee structure for providing stand-alone, content-focused mentoring sessions or office hours, including any required threshold of hours (i.e. min/max hours available) ● Fee variations for individual mentoring sessions/office hours vs. team-based mentoring sessions/office hours, including any required threshold of hours (i.e. min/max hours available) ● Any additional relevant fees costs

Due to the year-to-year nature of the CCEE’s funding, while Proposals may include multi-year project proposals, any contract with the selected Respondent(s) will need to be written such that it is for a single fiscal year with the ability to extend it to the next fiscal year at the exclusive option of the CCEE.

Respondents’ cost estimates may be a factor in awarding the contract. Since an RFP is not required, the CCEE/MCOE is not obligated to accept a Proposal based on cost estimates.

H. Data Protection

As set forth herein, the professional learning resources and services to be provided by Respondent will involve potentially receiving, storing, and interacting with private and confidential Personally Identifiable Information and Data related to LEA students and

staff (PII). Additionally, Respondents may be required to use PII and associated data to assist and support program evaluation related to the initiative. Thus, Respondents must provide a summary of their policies and procedures related to PII that shall include a detailed description of the following:

- 1) How Respondent will ensure any and all PII received, held, or used by Respondent will be secured and protected from public disclosure.
- 2) The procedure Respondent will use in the event any PII is accidentally released to any unauthorized individual, including, but not limited to, the procedure Respondent will implement to inform CCEE and the affected LEA and the actions Respondent will pursue to remedy the harm resulting from any such accidental unauthorized release of PII at no cost to CCEE, MCOE, or the LEA.
- 3) How Respondent will identify and comply with all laws applicable to any PII it receives or handles through its services.
- 4) The training procedure Respondent implements to ensure all Respondent employees and/or subcontractors maintain the confidentiality and privacy of any PII they encounter.
- 5) How Respondent will work with CCEE and the LEA to implement a procedure to ensure all PII is transferred between each party as necessary while ensuring all such PII is adequately protected pursuant to applicable law and the respective policies adopted by CCEE and/or the LEA.
- 6) Confirmation that Respondent will implement a procedure either to return all documents containing PII to the associated LEA and/or to delete any PII from its records upon completion of its services.

I. References (Half page maximum)

Provide a list of clients (including name, address, email address, and telephone number of contact person, as well as a description of the work performed) for whom Respondent has performed similar services.

J. Submission Review Rubric

All Proposals will be evaluated using the following criteria:

Proposal Quality	Project Experience/ Organizational Approach	Team Strength
<ul style="list-style-type: none"> ● Addresses all required components in the RFP ● Includes specificity in deliverables and action steps ● Activities/deliverables reflect CCEE's Theory of 	<ul style="list-style-type: none"> ● Demonstrated experience conducting projects similar to size, scope and focus of the project outlined in the RFP ● Organization can demonstrate impact of 	<ul style="list-style-type: none"> ● Demonstrates project management experience ● Identifies project lead ● Demonstrates expertise in appropriate content area(s) and delivery

<p>Action</p> <ul style="list-style-type: none"> ● Demonstrates understanding and applicability of CCEE’s Quality/Relevance/Usability (QRU) rubric 	<p>prior similar work</p> <ul style="list-style-type: none"> ● Demonstrates organizational flexibility of thinking to support outcomes ● Ability to adapt to current/changing situations as they arise ● Ability to respond to feedback 	<p>mechanism(s) to support each strand of focus outlined in the submission</p>
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The CCEE reserves the right to assign weight to each of the criteria and to consider additional or different factors in its evaluation of the Proposals.

VII. Rights of the CCEE/MCOE

This RFP does not commit the CCEE/MCOE to award a contract or pay any costs incurred in the preparation of a response to this RFP. CCEE/MCOE, at its sole discretion, may reject all Proposals and/or enter into direct negotiations with a Respondent or other party and enter into an agreement for all or part of the services set forth herein outside of the RFP process. The CCEE/MCOE is not required by law to use an RFP process but has elected to do so for the particular services described herein in order to seek qualified parties who meet the CCEE’s unique service needs. The CCEE/MCOE reserves the right to accept all or part of any Proposal or to cancel in part or in its entirety the RFP. The CCEE/MCOE further reserves the right to select the Respondent(s) that it considers to be in the best interests of the CCEE.

VIII. Submission Details

- A. As noted above, the CCEE/MCOE will begin accepting Proposals upon the date of issuance of this RFP, and will continue to accept Proposals until Monday, October 30, 2023 at 4:00 p.m. (Pacific Standard Time). While CCEE will begin reviewing Proposals submitted by this deadline, Proposals may be submitted after the deadline, and, at its discretion, CCEE may review those Proposals as needed for this RFP or future professional learning service needs, which work may commence after the date identified in the timeline above. Proposals that are submitted after the deadline must still adhere to all other requirements of this RFP.
- B. Respondents must submit an electronic signed copy of the original Proposal (as a PDF) via email to Dorcas Kong (dkong@ccee-ca.org) with the subject line: “Professional Learning RFP Submission.” Hard copy Proposals may not be accepted.
- C. Respondent shall be solely responsible for ensuring its Proposal arrives to the CCEE by the deadline set forth above in order to be eligible for CCEE’s initial selection process. The CCEE/MCOE shall not be responsible for any technical issues with email delivery.

- D. All Proposals should be verified before submission. Adjustments may not be permitted after submission to the CCEE. The CCEE/MCOE will not be held responsible for any Respondent errors or omissions in the preparation of their Proposal.
- E. Any costs incurred by the Respondents in the preparation of any information or material submitted in response to this RFP shall be the Respondent's sole responsibility.
- F. The CCEE/MCOE reserves the right to reject any and/or all Proposals, or to refuse to negotiate or withhold the award of any contract, for any or no reason. The CCEE/MCOE may also waive or decline to waive irregularities in any Proposal. The CCEE/MCOE further reserves the right to select the Proposal(s) that it considers to be in the best interests of the CCEE.
- G. The CCEE/MCOE may begin negotiations with selected Respondents at the CCEE's discretion.
- H. Upon selection of a Respondent, the CCEE/MCOE shall provide an agreement for negotiation by the Parties.
- I. All Proposals submitted in response to the RFP become the property of the CCEE and a public record and, as such, are subject to public disclosure.

IX. Receipt of Proposals; Contact Information

Respondents are not to contact the Marin County Office of Education, including Board members, the Superintendent or any other employee or representative of the MCOE or the California Collaborative for Educational Excellence, including Board members, the Executive Director, or any other employee or representative of the CCEE, apart from the CCEE Contact identified herein, regarding this RFP. Contacting such officials, employees and/or representatives, other than the CCEE Contact identified herein, may result in the Respondent's disqualification. CCEE and MCOE shall not be bound by any statement made by any CCEE/MCOE employee or agent regarding this RFP and/or the work set forth herein, except for the responses provided by the CCEE Contact as set forth herein.

All inquiries or questions for additional information should be directed in writing to the CCEE Contact, Dorcas Kong (dkong@ccee-ca.org) by Wednesday, April 12, 2023 at 4:00 p.m (Pacific Standard Time). CCEE will make every effort to respond, but any failure or delay in responding shall not excuse a Respondent's failure to comply with any requirements for submission set forth herein, including the submission deadline.

In order to be considered in the initial evaluation of timely Proposals, Respondents must submit an electronic signed copy of the original Proposal (as a PDF) via email to the CCEE Contact, Dorcas Kong (dkong@ccee-ca.org), by Monday, October 30, 2023 at 4:00 p.m. (Pacific Standard Time) with the subject line: "Professional Learning RFP Submission."