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REQUEST FOR PROPOSALS FOR **DIRECT TECHNICAL ASSISTANCE SUPPORT**

ISSUED BY:

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

ISSUED ON:

September 22, 2023

REVIEW OF PROPOSALS BEGINS:

October 18, 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

<u>Activity</u>	<u>Date</u>
Release of Request for Proposals	September 22, 2023
Questions from Respondents Due (if any)	October 4, 2023 (4:00 p.m. PST)
Responses to Respondents Questions (if any)	October 11, 2023
Review of Proposals Begins	October 18, 2023
Proposals Accepted Through	March 29, 2024 (4:00 p.m. PST)
Work to Begin No Earlier Than	October 23, 2023
Duration of Services	The initial term of this Agreement shall begin on the date of executed contract and shall end on June 30, 2024; annual extensions possible
<i>Note: All dates are preliminary and subject to change.</i>	

II. Purpose

The purpose of this RFP is to secure individuals, local educational agencies, or organizations with the expertise and experience, to advise and assist school districts, county superintendents of schools, and charter schools in achieving the goals set forth in a local control and accountability plan adopted pursuant to Education Code 54074 (see section (b) and (f)(1-4). The services provided will support the CCEE in facilitating continuous improvement for local educational agencies within California’s system of public school support.

III. Background and Context

Established by the Legislature in 2013 with the enactment of the Local Control Funding Formula (“LCFF”), the CCEE became operational in 2015 to “advise and assist” local educational agencies (“LEAs”) with achieving the goals set forth in their Local Control and Accountability Plans (“LCAPs”). (Ed. Code § 52074.) CCEE is an integral part of the Statewide System of Support, which is designed to build the capacity of LEAs to support LCFF, through the continuous improvement of pupil performance, address the achievement gaps between student groups, and improve outreach and collaboration with partners to ensure that LCAPs reflect the needs of pupils and the community, especially for historically underrepresented or low-achieving populations (Ed. Code § 52059).

The purpose of CCEE’s Direct Technical Assistance (“DTA”) is to “advise and assist” county offices of education (“COEs”) and local educational agencies (“LEAs”) in need of targeted assistance in achieving their Local Control and Accountability Plan (“LCAP”) goals by effectively meeting the needs of students historically underserved. The DTA process utilizes school/district turnaround principles and quality improvement practices to effectively build the capacity of LEAs to support all students’ academic and social-emotional well-being. When CCEE provides this assistance to an LEA, their teams collaborate with external partners and professional content experts to create a culture of continuous improvement that addresses systemic barriers to teaching and learning.

In 2019, the statute outlining the CCEE’s mission (Ed. Code § 52074) was updated to designate school districts that receive emergency apportionments pursuant to specified provisions as being referred to CCEE, after which CCEE may conduct a systemic review of the district. CCEE may further coordinate and facilitate assistance to the district provided by governmental agencies in order to facilitate and provide coherent support.

CCEE also provides technical assistance to school districts that meet specified student performance criteria over a period of three out of four consecutive school years.

CCEE will begin accepting Proposals on October 18, 2023, and will continue to accept Proposals until March 29, 2024, at 4:00 p.m. (Pacific Standard Time). While CCEE will begin reviewing Proposals submitted by this deadline, Proposals submitted after October 18, 2023, but before March 29, 2024, at its discretion, CCEE may review those Proposals as needed for this RFP or future continuous improvement support for local educational agencies within California’s system of public school support, 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.

The selected Respondents will be responsible for supporting CCEE in its’ support of LEA’s to implement State priorities as described in subdivision (d) of Section 52060, including the state and local indicators developed for the California School Dashboard pursuant to Section 52064.5. In addition to supporting the improvement of LEA’s, the CCEE supports the quality of teaching, and the quality of school district and schoolsite leadership. This also includes successfully addressing the needs of special pupil populations, including, but not limited to, English learners, pupils eligible to receive a free or reduced-price meal, pupils in foster care, and individuals with exceptional needs.

CCEE Theory of Action

As shown in the graphic below, CCEE’s Theory of Action is predicated on our 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 shaping student outcomes. And we further have defined our 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/theoryof-action/>.

Direct Technical Assistance (DTA) Framework and Approach

The Direct Technical Assistance provided by CCEE leverages Joanne Quinn and Michael Fullan research around district improvement published in 2016 as, *Coherence: The Right Drivers in Action for Schools, Districts and Systems*. The framework is highlighted by 4 domains: focusing direction, cultivating collaborative cultures, deepening learning, and securing accountability. The four domains are interconnected and are addressed concurrently and on an ongoing basis. In addition to these 4 domains overlays leadership. Leadership at every level within the system is an essential element in the coherence making process. Essential to the coherence making process of integrating the four domains is leadership at every level of the system. The Coherence Framework will be the lens through which DTA supports the instructional systems, structures, processes, and practices of the local education agency.

Additionally, the team utilizes 7 instructional components derived from school turnaround research and work from the New York Department of Education and Massachusetts Department of Education district review processes. These instructional components are aligned with the Coherence Framework, which includes focusing direction, cultivating collaborative cultures, deepening learning, securing accountability, and leadership. They provide specificity within the coherence making process and within each domain of the Coherence Framework. The instructional components range from *Culture, Coherence, and the Planning Process* to *Student and Family Engagement*, to *Professional Learning*, to *Assessment and Accountability*. The instructional components are aligned with the eight LCFF priority areas to ensure that the needs of the local education agency are clearly understood and studied. Both the instructional components and the Coherence Framework are used together to better understand the systems, structures, processes, and practices of the local education agency.

IV. Scope of Services

CCEE is seeking submissions of services that will support the CCEE in facilitating continuous improvement for local educational agencies pursuant to Education Code 54074, and as outlined in this RFP.

This will include, but is not limited to:

- A. Provide coaching and support to the LEA to identify and help sustain the work needed to achieve systemic improvement in collaboration with the LEA, their COE, and other partner agencies.
- B. Collaborate with CCEE and partners to engage in internal continuous improvement processes
- C. Identify and use school and District turnaround principles that effectively build the capacity of system leaders to address the academic and social emotional well-being of all students.
- D. Provide LEA's with support and guidance to improve instructional practices and cultivate coherent systems to positively impact student outcomes.
- E. Provide consultation, develop recommendations and implement support aligned with quality improvement practices, the Coherence Framework, and the Direct Technical Assistance process
- F. Collaborate with staff from one or more local educational agencies (LEAs) selected by CCEE to develop and implement Multi-Tiered Systems of Support grounded in the Continuous Improvement Cycle;
- G. Provide direct support and professional development to staff of LEAs to develop effective instructional programs for students-at-risk and students with disabilities;
- H. Support LEAs in the development and evaluation of curriculum, instruction, and assessment, including differentiated instruction for students-at-risk and the integration of students with disabilities

Respondents may also describe their ability to increase CCEE's capacity to engage in the work identified above by providing professional learning to CCEE staff on quality improvement, equity centered leadership and turnaround practices.

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 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 four years of recent (within the last seven years) experience in coaching instructional leaders at various levels (school site, central office, county office of education) to engage in quality improvement activities. Respondents should demonstrate experience in the development of instructional and/or organizational 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 RFP Section VI.E. 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 DirectTechnicalAssistance@ccee-ca.org. Questions and requests for clarifications may be submitted at any time up to October 4, 2023, at 4:00 p.m. (Pacific Standard Time). CCEE will make every effort to provide responses and clarifications via CCEE’s website at ccee-ca.org by October 11, 2023, at 4:00 p.m. (Pacific Standard Time). 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. Respondents are solely responsible for monitoring any questions or answers posted on the CCEE’s website and incorporating any answer 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 applicable 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 which do not meet all the requirements, at its sole discretion. Proposals should not be any longer than 20 pages, including résumés of identified personnel. Proposals can utilize tables and/or bullets to communicate the main ideas and flow of work more clearly.

A. Cover Letter

B. Scope of Project with Costs and Fees

The Proposal must include a section that addresses all parts of Section VI (Proposal Specifications/Requirements for Submittal) of the RFP. All tasks and subtasks must be addressed.

Provide an annual breakdown of the proposed fees and costs (including for organization personnel) for the project. The total annual fees and costs must be stated as a “not to exceed” amount. If respondent is not designing their own method of delivery, you may follow the following format:

Service Provided (include those you are able to provide):	Breakdown of proposed fees and costs to include:
A. Provide coaching and support to the LEA to identify and help sustain the work needed to	Fee structure (e.g., hourly rate, deliverable) for revisions to resources

achieve systemic improvement in collaboration with the LEA, their COE, and other partner agencies.	and tools
B. Collaborate with CCEE and partners to engage in internal continuous improvement processes	Fee structure (e.g., hourly rate, deliverable) for revisions to resources and tools
C. Identify and use school and District turnaround principles that effectively build the capacity of system leaders to address the academic and social emotional well-being of all students.	Fee structure (e.g., hourly rate, deliverable) for revisions to resources and tools
D. Provide LEA's with support and guidance to improve instructional practices and cultivate coherent systems to positively impact student outcomes.	Fee structure (e.g., hourly rate, deliverable) for revisions to resources and tools
E. Provide consultation, develop recommendations and implement support aligned with quality improvement practices, the Coherence Framework, and the Direct Technical Assistance process	Fee structure (e.g., hourly rate, deliverable) for revisions to resources and tools
F. Collaborate with staff from one or more local educational agencies (LEAs) selected by CCEE to develop and implement Multi-Tiered Systems of Support grounded in the Continuous Improvement Cycle;	Fee structure (e.g., hourly rate, deliverable) for revisions to resources and tools
G. Provide direct support and professional development to staff of LEAs to develop effective instructional programs for students-at-risk and students with disabilities;	Fee structure (e.g., hourly rate, deliverable) for revisions to resources and tools
H. Support LEAs in the development and evaluation of curriculum, instruction, and assessment, including differentiated instruction for students-at-risk and the integration of students with disabilities	Fee structure (e.g., hourly rate, deliverable) for revisions to resources and tools

Due to the year-to-year nature of the CCEE's funding, the contract with the selected Respondent(s) will need to be written such that it is fiscal year-to-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 bid based on cost estimates.

- C. Description of Respondent Organization (to be completed if Respondent is more than one individual)

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 application. 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 evaluation program
- List of basic services generally provided by the organization

D. Organizational Capacity and Previous Experience (may be detailed in the cover letter or part of résumés)

The Proposal must describe and demonstrate the Respondent's capacity and ability to perform and administer all activities related to this project. This includes a demonstration of the Respondent's experience in the development of instructional and/or organizational leadership.

The Proposal should also reflect the Respondent's understanding of the California education policies as they may impact the work outlined in this RFP as well as a deep knowledge of instructional practice decisions made at the school and district levels to support student engagement, achievements, and outcomes.

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.

E. Qualifications of Respondent Personnel (to be completed if Respondent is more than one individual, 2 page maximum, including organization chart)

Please include the name of all individuals proposed by the organization to perform the duties described above in Section IV, Scope of Services, including the qualifications of each and what each would be doing. Current résumés for each individual must be included as attachments to the submitted Proposal and will be counted in the page limits.

E.1. Project Lead

The Proposal must identify a dedicated Project Lead by name and include descriptions of how the proposed Project Lead meets the qualifications required. 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 effectively and timely.

The Project Lead must have, at a minimum, four years of recent experience (within the last seven years) managing a project of comparable size and scope of the services described in this RFP.

The Project Lead will serve as the primary contact for the CCEE.

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 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. 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
- c. Résumés for each consultant or personnel of a subcontractor who will be assigned to the project.

E.4. Organization Chart

An organization chart, including organizational titles, project roles, and names should be included with the Proposal.

F. Conflict of Interest

Please disclose any past or current business or other relationship with the CCEE, CDE, CCEE Governing Board members, or MCOE.

G. Ownership of Program Data, Materials, and Intellectual Property Rights

Respondents are hereby notified of the following provisions, which will be incorporated into any contract entered into as a result of this RFP. CCEE/MCOE reserves the right to alter or amend these terms during the negotiations process.

Ownership of Data and Documents

All program data, reports, documents, and other items specifically generated for CCEE in the course of providing services to CCEE shall be the property of CCEE and shall be provided to CCEE upon full completion of services, termination of this Agreement, or as otherwise specified in this Agreement. Notwithstanding the foregoing, Contractor retains all rights, title and interest in and to any and all of the Contractor’s software, materials, tools, forms, documentation, training and implementation materials, and intellectual property (collectively, “Contractor Materials”).

Content License

Contractor agrees to grant CCEE a free, transferable, non-exclusive license to use, reproduce and distribute all information and content created by Contractor and

provided to CCEE under this Agreement (including, but not limited to, any written report, guide, set of practices, record, document, slide, account, or summary), provided that (i) the use, reproduction, and distribution is limited to educational and training purposes; (ii) the information and content is not sold, reproduced, or used, in whole or in part, as part of any fee-generating activity or product; and (iii) Contractor, as appropriate, is identified as the creator and/or owner of the information and content by including the appropriate name or logo on the information or content created prior to this Agreement.

H. References (½ page maximum)

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

I. 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 • Reflects CCEE’s Theory of Action in proposed activities/deliverables • Demonstrates understanding and applicability of CCEE’s Direct Technical Assistance Framework 	<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 prior similar work • Demonstrates organizational flexibility of thinking to support outcomes • Ability to adapt to current/ changing situations as they arise • Ability to respond to feedback 	<ul style="list-style-type: none"> • Demonstrates project management experience • Identifies project lead • Demonstrates expertise in appropriate content area(s) and delivery mechanism(s) to support each strand of focus outlined in the submission

If the Respondent represents an individual, the submission pieces include, Cover Letter, Resume and Scope of work, Conflict of Interest. For example, the table below may detail the scope of work for an individual respondent.

Example:

Service	Breakdown of proposed fees and costs to include:
Collaborate with CCEE and partners to engage in internal continuous improvement processes	\$250 per hour, \$5,000 Max

Collaborate with staff from one or more local educational agencies (LEAs) selected by CCEE to develop and implement Multi-Tiered Systems of Support grounded in the Continuous Improvement Cycle;	\$250 per hour, \$2,000 per day, \$10,000 Max
Increase CCEE’s capacity to engage in the work identified above by providing professional learning to CCEE staff on quality improvement, equity centered leadership and turnaround practices.	\$2,500 Per session, 12 Session Max \$30, 000 Max
Total	\$45,000

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. The CCEE/MCOE is not required by law to use an RFP process, and the utilization of an RFP process shall not obligate the CCEE/MCOE to comply with any statutorily required course of action. CCEE/MCOE has elected to utilize an RFP process for the particular services described herein for the sole purpose of seeking qualified parties who meet the CCEE’s unique service needs. The CCEE/MCOE reserves the right to enter into direct negotiations with a Respondent or any other party for the services set forth herein, accept all or part of any submittal, 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 October 18, 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 electronically signed copy of the original Proposal (as a PDF) via email to DirectTechnicalAssistance@ccee-ca.org with the subject line: “Direct Technical Assistance RFP Submission.” Hard copy Proposals may not be accepted.
- C. Respondents shall be solely responsible for ensuring its Proposal arrives to the CCEE by the deadline set forth above. 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 errors or omissions on the part of the Respondent 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 sole responsibility of the Respondent.
- 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 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 selecting 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, may be subject to public viewing and disclosure pursuant to applicable laws, including the California Public Records Act (Gov. Code § 7922.535, et seq.).

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. Contacting such officials, employees, and/or representatives other than those persons listed below may result in the disqualification of the Respondent.

All inquiries or questions for additional information should be directed in writing to DirectTechnicalAssistance@ccee-ca.org by October 4, 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.

Respondents must submit an electronically signed copy of the original Proposal (as a PDF) via email to DirectTechnicalAssistance@ccee-ca.org by October 18, 2023, at 4:00 p.m. (Pacific Standard Time) with the subject line "Direct Technical Assistance RFP Submission."

X. References

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