

**REQUEST FOR PROPOSALS**  
**Consultant Contract**



**Phase Two Process and Outcome Evaluation of the Early School Success (ESS) Initiative**

**Proposal Review and Selection Process Schedule**

<b>SCHEDULE OF EVENTS</b>	<b>DATE/TIME</b>	<b>DETAILS</b>
Solicitation Release	10/6/2023	<a href="#">WEBSITE: Request for Proposal</a>
Question & Answer Period	10/6/2023 - 11/8/2023	E-mail all questions to <a href="mailto:marina@childinst.org">marina@childinst.org</a> with "Question: ESS Evaluation RFP" in the subject line.
Proposal Submission Deadline	11/17/2023	Submission instructions included in pp. 8-9.
Interviews	12/4/2023 - 12/6/2023	Top 3 scoring consultants may be contacted to schedule an online interview.
Announcement of Successful Proposer(s)	12/8/2023	E-mail notifications will be sent out, including the next steps.
Anticipated Contract Negotiation Period	12/8/2023 - 12/15/2023	
Anticipated Contract Execution	1/1/2024	Contract execution timeline may be subject to change based on year-end contracting and holiday schedules.

*The Children’s Institute reserves the right to modify this schedule.*

*Changes will be posted on Children’s Institute’s Early School Success page on its website:*

<https://childinst.org/our-work/early-school-success/>

**Proposal Contact Information**

Marina Merrill, PhD – Director of Research & Strategy | Email: [marina@childinst.org](mailto:marina@childinst.org)

**Delivery Address** Submit materials via email to [marina@childinst.org](mailto:marina@childinst.org)

See detailed instructions on pp. 8-9.

## SOLICITATION OVERVIEW

The Children’s Institute (CI) requests proposals from qualified evaluators for the Phase 2 Program Evaluation of the Early School Success (ESS) Initiative. This evaluation aims to assess the ESS initiative’s efficacy in enhancing early learning, fostering a unified pre-kindergarten to fifth-grade experience, promoting school success, and mitigating educational disparities.

### **Evaluation Period:**

January 1, 2024 – December 31, 2025. Contracts are subject to annual renewal.

### **Budgetary limits are set at:**

Year 1: \$325,500.00

Year 2: \$340,000.00

## EVALUATION OBJECTIVES

Children’s Institute seeks an evaluation consultant to focus on the following Objectives in service of improving program performance, demonstrating accountability, informing decision-making, and generating new knowledge about program effectiveness and impact.

1. **Process and Outcome Measurement Tools:** Design measurement tools for both process and outcome evaluation of the initiative;
2. **Data Infrastructure for Alignment:** Assist ESS District Teams in refining data infrastructure, ensuring better preschool to elementary alignment; and
3. **Capacity for Measurement and Data Improvement:** Partner strategically to enhance the CI team and ESS District sites’ capabilities in Measurement & Data for Improvement.

## ABOUT THE EARLY SCHOOL SUCCESS (ESS) INITIATIVE

The Early School Success (ESS) Initiative champions a unified approach to pre-k through fifth-grade education, emphasizing cohesive early learning strategies and an equitable learning environment. The objective is a seamless transition between preschool and elementary education, experienced as a singular, high-quality educational journey. ESS incorporates human-centered design and improvement science, empowering school teams to tackle the root of educational disparities and overcome ingrained barriers to success. The initiative

mandates districts to challenge systemic racism, harness data-driven improvements, and commit to continuous learning.

### **Overarching Goals:**

- **Innovative Classroom Practices:** Foster a culture where educators are encouraged to ideate, implement, and review new strategies to enhance classroom joy, engagement, and alignment from PreK–6th.
- **Cross-school Learning:** Encourage inter-district collaboration where educators can exchange feedback, share their successes, and introduce new teaching methodologies.
- **Showcase and Celebration:** Create platforms where educators can proudly display their innovative practices, fostering a culture of mutual feedback and continuous improvement.

In the past five years, the [Children’s Institute](#) along with a team of [Community Design Partners](#) consultants, has collaborated with two cohorts spanning four Oregon school districts, advancing the ESS vision. This engagement has involved top-tier professional development, guiding district and school teams in the rapid-cycle “Plan-Do-Study-Act” (PDSA) methodology, optimizing the synergy between preschool and elementary education.

Following this half-decade, the Institute’s focus is pivoting to fine-tune the existing model, ensuring districts maintain continuous improvement, and amplify effective practices. The Children’s Institute envisions statewide adoption of ESS, recognizing its pivotal role in aligning and elevating early education. The forthcoming evaluation will be instrumental in this expansive progression.

### **Phase 2: Strategic Expansion and Outcomes (2023–2028)**

As ESS delves into its Phase 2 from 2023 to 2028, it is poised to achieve transformative outcomes:

- **Boosted Student Engagement:** Focusing on innovative and responsive pedagogical methods to increase student enthusiasm and participation.
- **Systemic Change:** A committed endeavor to dismantle systemic racism and reduce bias, ensuring policies and practices reflect inclusivity and justice.
- **Coordinated Efforts:** Districts will exhibit enhanced coordination in policies, procedures, and funding streams, fortifying every facet of early education and care.

- **Aligned Instruction:** A noticeable improvement in the horizontal and vertical alignment of instruction, curricula, and classroom strategies will be observed.

By the conclusion of Phase 2, every ESS site will possess:

- Proficient expertise in innovative early childhood teaching methodologies.
- A unified language across the district, guiding curriculum, classroom instruction, and resource decisions.
- A vibrant community spirit, where families, local partners, and educators co-own the initiative's vision and successes.
- An ongoing community of practice within the ESS district network, acting as a cradle for early learning innovation.
- A unique opportunity to guide statewide policy by showcasing the benefits of a synchronized instructional approach.

#### **Strategic Expansion Focus Areas:**

- **Rural Sites:** Continued comprehensive support for rural cohorts like Lincoln County and St. Helens School Districts, emphasizing improvement processes and early learning alignment.
- **Learning Labs:** Districts in ESS Cohort I are transforming into Learning Labs. They will leverage these to not just expand internally but will also serve as exemplary models to inspire and advocate for ESS methodologies statewide.
- **Early Learning Academy (ELA):** An initiative that aids educator teams in expanding early learning. By 2028, ELA is set to scale and support between 50–70 districts.
- **Change Library:** An accessible platform that aids educator teams by offering tested changes and examples, focusing on diverse learning aspects like social emotional learning, literacy, and inclusive education.
- **Statewide Advocacy:** A focused effort to secure public sector support and investment for the ESS and ELA, recognizing their potential to revolutionize early learning.

To learn more about the ESS Initiative, please visit the [Children's Institute's website](#).

**YEAR I TIMELINE OF WORK**

<b>Phase</b>	<b>Scope of Work Elements</b>	<b>Anticipated Timing</b>
<b>Start-Up Phase</b>	Contract Negotiation & Execution Period	December 2023
<b>Work Phase 1: Design</b>	<p>Work with CI to finalize the evaluation design and establish a clear Work Plan.</p> <p><b>Deliverables:</b> Evaluation Design and Work Plan.</p>	January – February 2024
<b>Work Phase 2: Implementation</b>	<p>Implement process evaluation as designed in Work Phase 1. Any planned primary data collection should occur between March and June.</p> <p><b>Deliverables:</b> Data collection protocols, Interim Progress Report.</p>	March – July 2024
<b>Work Phase 3 Reporting</b>	<p>Report evaluation findings and recommendations to Children’s Institute staff and stakeholders.</p> <p><b>Deliverables:</b> Technical report with strategy recommendations, community-facing brief, presentations.</p>	August – October 2024

**DATA & METHODS**

This evaluation should utilize a mixed methods approach, integrating both qualitative and quantitative data. The consultant can use a blend of primary data collection and secondary data sources relevant to the evaluation's objectives. The evaluation team will work with CI and

each of the partner districts to develop data sharing agreements and determine locally accessible and relevant data available for analysis.

The selected consultant and Children's Institute will work closely together in partnership with the local district teams to identify data gaps and needs and determine what primary data collection is still needed to understand how the initiative is supporting improved outcomes at both the system and student-levels.

## REPORTING

The consultant will be required to produce a series of final evaluation outputs to communicate the results from the project to Children's Institute Staff, ESS district/school partners, project consultants, project funders, and other key audiences. The approach for data presentation and interpretation to guide program and policy recommendations is flexible, with the consultant's expertise guiding this. However, at a minimum, the following deliverables are anticipated:

**Technical Report** – A conclusive end-of-year report detailing the methodologies, results, conclusions, and recommendations to foster continuous improvement and strategic insight.

**Community Facing Brief** – A concise, user-friendly summary of the evaluation's findings, tailored for a broad audience, including the lay public.

**Summary Presentation** – The consultant should distill the primary insights and conclusions from the technical report into a slide deck presentation. This presentation will be delivered to essential stakeholders in 3-4 sessions.

## MINIMUM QUALIFICATIONS

We are seeking an evaluation consultant or evaluation consultant team who meet the following minimum qualifications:

1. Consultant team has knowledge and experience with culturally responsive evaluation practices, including demonstrated ability to conduct data collection approaches that deliver the perspectives of communities that have experienced historical and contemporary injustices in government policy, including communities of color, linguistically diverse communities, immigrant communities, and other communities that have experienced barriers to participation in publicly funded programs.

2. Consultant team has demonstrated experience applying mixed methods (integrated qualitative and quantitative methods) to evaluate program outcomes holistically.
3. Principal Investigator and/or key members of the evaluation team have experience in conducting evaluation research to complement improvement science research to understand whether changes made by school teams are effective in influencing improved educational outcomes.
4. Principal Investigator and/or key members of the evaluation team have evaluation/research experience related to early childhood education, elementary education, and dual- and multi-language instruction.
5. Principal Investigator and/or key members of the evaluation team have subject matter expertise and/or evaluation/research experience related to early intervention/early childhood special education and K-12 special education.
6. Consultant team demonstrates knowledge of district and school-run early childhood education delivery settings.
7. Consultant team has demonstrated experience with data collection (interviews, focus groups, surveys, etc.) with populations that speak a primary language other than English.

## **PROPOSAL COMPONENTS FOR THE ESS INITIATIVE**

Submit a detailed proposal including the elements included below. Make sure it is clear to an educated non-specialist and is within the specified page limits for each section, not to exceed 25 pages. Appendices for supplemental materials, like resumes or tables, are allowed, but they may not be closely reviewed due to time constraints.

### **Experience and Expertise (5 pages):**

1. What is your organization's experience in conducting educational evaluations, particularly in the early childhood education domain?
2. Have you previously evaluated initiatives focused on pre-k through elementary grade alignment and early learning programs (please describe)?
3. Describe your team's expertise in improvement science, human-centered design, and data-informed decision-making.
4. For any gaps in current understanding, how would your team approach learning to ensure you provide sound insights?

**Approach to Evaluation (3 pages):**

1. How will you design the evaluation to address the specific goals and objectives of the Early School Success (ESS) initiative?
2. What evaluation methodologies and data collection techniques will you employ to assess the impact of ESS on schools, districts, and students?

**Equity Focus (2 pages):**

1. Describe your experience incorporating equity, diversity, and inclusion principles into educational evaluations.
2. How will you ensure that your data collection tools and instruments are culturally responsive and sensitive to diverse perspectives and student populations?

**Data Collection and Analysis (4 pages):**

1. How will you gather data from various stakeholders to provide a comprehensive evaluation of the ESS initiative?
2. How will you use qualitative and quantitative data to triangulate findings and draw meaningful conclusions?
3. How will you analyze data through an equity lens to identify disparities and equity-promoting practices within the ESS initiative?

**Collaboration and Communication (3 pages):**

1. Explain your approach to collaborating and co-learning with clients and stakeholders.
2. How will you ensure that your evaluation findings are presented in a clear, accessible, and actionable manner for different audiences?
3. What is your team's style of Project Management? What tools and processes have you successfully utilized to ensure you meet deliverable deadlines and outcome goals?

**Resources and Timeline (4 pages):** Provide a detailed timeline for the Year 1 evaluation, including key milestones and deliverables. Outline the resources and team members dedicated to the evaluation, including their qualifications, roles, and estimated time dedicated to the project.



**Cost Proposal and Narrative (2 pages):** Submit a comprehensive budget for Year 1, breaking down estimated hours by task and hourly rates for each team member. Provide a complete Budget Narrative explaining Year 1 allocations.

**References and Past Performance (2 pages):** Provide references from previous clients for whom you have conducted similar educational evaluations. Highlight any achievements or outcomes from your past evaluations that demonstrate your capacity to conduct impactful evaluations and align to the minimum qualifications outlined on pp. 6-7.

**Prior Work Samples (Submit as Appendices, no page limit):** Offer at least three samples from the proposed evaluation team relevant to this project. Ensure one sample led by the principal investigator is included. If sub-consultants are involved, attach relevant work samples for them. Preferably, samples should relate to this RFP's scope and depict experiences detailed in qualifications and at least one sample should demonstrate messaging for a lay audience.

## **SUBMITTING RESPONSES**

**Deadline:** Responses must be received no later than 5:00 p.m. PST on Friday, November 17, 2023.

**Electronic Submissions:** Submit your responses electronically via email to [marina@childinst.org](mailto:marina@childinst.org).

**File Formats:** Acceptable file formats are Adobe PDF and/or MS Excel.

**Proposal Compilation:** The Proposal Response should be compiled and submitted as a single file.

### **Naming Conventions for Email and Attachments:**

- Email Subject: [Consultant Name] ESS Evaluation Proposal
- File Attachments: [ConsultantName]\_ESS\_Eval\_Item#\_Item
  - Example: StarConsulting\_ESS\_Eval\_1\_Letter of Interest

If the file size prevents you from attaching all required documents in a single email, feel free to send your proposal across multiple emails. In this case, adhere to the following naming structure:

- Email Subject: Email [#] of [Total # of emails]: [Consultant Name] ESS Evaluation Proposal
  - Example: Email 1 of 3: StarConsulting ESS Evaluation Proposal

**Mail or Hand Deliveries:** Although online proposal submissions are preferred, accommodations can be made for those who may face challenges with this method. If you need to submit your proposal via mail or hand delivery, please notify us for arrangements. Send your notification to [marina@childinst.org](mailto:marina@childinst.org) at least 3 full business days in advance.

**Questions about the Submittal:** For any inquiries regarding this submission, please reach out to [marina@childinst.org](mailto:marina@childinst.org) with the email subject "Question: ESS Evaluation RFP".

## **PROPOSAL EVALUATION & SELECTION CRITERIA**

To ensure a rigorous and unbiased evaluation, CI has created a comprehensive scoring matrix to guide the assessment of the received proposals. This section provides clarity on the matrix's aim, structure, and criteria.

The scoring matrix is crafted to simplify the evaluation process, offer a structured foundation for assessment, and guarantee that each proposal is consistently and fairly evaluated. It delineates essential criteria for reviewing various sections of the proposals and attributes specific weight to each based on its significance.

The matrix is divided into five sections, each underscoring a vital component of the proposals. Each section holds criteria reflecting particular attributes we desire in a partner. A specific point value is associated with each criterion. Selection Committee Reviewers will assess proposals against these benchmarks and allocate points reflecting the quality of each response.

For every criterion, the proposal's content will be evaluated and assigned points correlating to the quality of the response. The points for each section will be aggregated by tallying the scores of all associated criteria to determine a cumulative total score. The cumulative points across sections will provide the overall ranking of proposals.

**Interviews:** The Children's Institute might interview top-ranked contenders post proposal evaluation. If interviews ensue, the combined interview and proposal scores will determine firm rankings. Interviewed consultants should bring the Principal Investigator(s) listed in their proposal, and introducing other key team members is advised. Consultants should not introduce individuals that are not affiliated with their team or firm without prior notification.

**References:** The Children's Institute may engage with one or several references, irrespective of whether they were listed by the Proposer.

**Selection:** The highest-ranked Proposer(s), considering both written proposals and interviews (if conducted), will be chosen. The Children's Institute retains the right to finalize the selection based on combined results and the Selection Committee's consensus.

**Contract Negotiations:** The Children's Institute may discuss certain proposal elements with the successful Proposer to best meet its needs. While negotiations can encompass any proposal aspect, standard contract terms are typically non-negotiable.

**Right to Award to Next Ranked Consultant:** Should a contract stemming from this solicitation terminate within 90 days, The Children's Institute can revisit the solicitation process to potentially award the next highest-ranked consultant.

**Changes to the RFP:** Modifications to this RFP may occur if The Children's Institute deems them necessary. Any change will be officially communicated via an addendum from the Children's Institute's Project Manager.

**Receiving Addenda and/or Question and Answers:** It remains the consultant's duty to stay updated on addenda, responses, or notifications from The Children's Institute.

**No Conflict of Interest:** Consultants and their associates (officers, directors, trustees, partners, or employees) must not hold any business ties or familial relations with any official or employee from The Children's Institute involved in the selection or evaluation process. The Children's Institute will be the sole determiner regarding compliance.