

Standard Bid Request for Proposals for:
Study of Pupil Weights in Vermont's Education Funding Formula

Issued by:

Vermont Agency of Education

For issuance on:

August 8, 2018

Proposals due: August 31, 2018

Questions should be addressed to:
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Overview

The Agency of Education is directed by Sec. 11 of No. 173 of the 2018 Acts and Resolves of the Vermont General Assembly (Act 173) to make recommendations on:

1. whether the census grant as defined in the amendment to 16 V.S.A. § 2961 in Sec. 5 of No. 173 of 2018 should be adjusted for supervisory unions that, in any one year, have relatively higher costs than other supervisory unions in supporting students who require additional support;
2. methods other than per pupil weighting that would further the quality and educational outcomes of students; and
3. the criteria for determining weighted long term membership of school districts under 16 V.S.A. § 4010 and if new criteria are advisable.

To assist it in this work, the Agency of Education is further directed by Act 173 to contract with a contractor with expertise in Vermont’s education funding system to produce a report based on comprehensive analysis to inform the Agency’s recommendations.

Contract period: The proposed period is from October 15, 2018 through on or about March 1, 2020. The definite period will be stated in the executed contract upon agreement with the State and the Contractor.

RFP Timetable

RFP posted	August 8, 2018
Deadline for questions about RFP	August 20, 2018
Proposal submission deadline	August 31, 2018
Selection notification	September 15, 2018
Anticipated commencement of contract	October 15, 2018

Proposal Guidelines and Requirements

Bidder Qualifications

For a proposal to be considered, a bidder must demonstrate

1. Extensive knowledge of Vermont’s education funding system;
2. Extensive knowledge of and experience in the study of state-level education funding;
3. Extensive knowledge of the Vermont’s school governance structure; and

4. Extensive knowledge of and experience in statistical modeling to analyze school funding formulae.

Scope of Work

The Vermont Agency of Education seeks proposals for a comprehensive analysis and report on the current per pupil weighting factors used in Vermont's General Education funding formula, as well as recommendations for potential new weighting factors that will better ensure the quality and equity of educational outcomes for students.

The study shall provide an evaluation and analysis of the following items per [2018 Acts and Resolves No. 173 Sec. 11](#):

1. the current weighting factors and any supporting evidence or basis in historical record for these factors;
2. the relationship between each of the current weighting factors and the quality and equity of educational outcomes for students, specifically with respect to rural students;
3. whether any current weighting factors, including for students from economically deprived backgrounds and for students for whom English is not the primary language, should be modified and if so, how to modify the factor in order to further the quality and equity of educational outcomes for students;
4. whether new weighting factors should be included for population density and for students who attend regional career technical education centers and if deemed appropriate, why such a weighting factor should be added and how it would further the quality and equity of educational outcomes for students; and
5. whether the census grant as provided under 16 V.S.A. § 2961 (d)(1)(A), as amended by Act 173, should be adjusted for supervisory unions that in any one year, have relatively higher costs than other supervisory unions in supporting students who require additional support.

As part of the response, bidders should describe all data/sources/stakeholders bidder anticipates will be needed for each part of the study. Please note that all data desired by the bidder may not be readily available. Discrepancies between what is desired and what is available will be negotiated through the contracting process.

Deliverables

1. Prior to beginning the report, the contractor shall submit a project plan for the completion of the report, including specific timelines and methodologies for the following components:
 - a. stakeholder engagement and interviews, including preliminary instruments and methods for collecting information;
 - b. analysis of the current education funding formula weights and rationale for additional weights or updates to the current ones;
 - c. complete results of statistical analysis (technical appendices may be used), and
 - d. drafting and completing the final report.
2. The contractor shall conduct focus groups to inform its analysis. The focus groups shall consist of district leadership throughout Vermont and shall take place in rural, mid-

population and urban areas. Districts that serve high, moderate and low levels of poverty and high, moderate and low levels of English language learners shall be represented in the focus groups. A discussion and results of focus groups shall be included in the Final report.

3. The final report and recommendations shall be submitted to the AOE by October 22, 2019, for submission to the Vermont General Assembly no later than November 1, 2019. The final report shall include the following as a minimum:
 - a. A literature review of academic research on best practice funding factors in rural or non-rural contexts as relevant, for students with different characteristics, including but not limited to English Language learners (ELLs), students living in poverty, and students who require special education services.
 - b. Historical context and an evaluation of the historical rationale for the current weights.
 - c. An evaluation of the relationship between the current weights and equity and quality based on the definitions of equity and quality adopted by the Vermont State Board of Education. As outlined in 2018 Act No. 173 a part of this analysis should speak directly to the impact on rural students.
 - d. An analysis of how weighting factors affect the current funding model and any subsequent challenges to relevant student categories, if any, and evaluation of patterns and discontinuities across sites.
 - e. An evaluation of the additional impact, both positive and negative, of specific Vermont policies on small Vermont schools in areas with lower population density in particular. These shall include:
 - i. Act 77 (including the creation of phantom students associated with Early College);
 - ii. exemption from the excess spending threshold for school districts that do not operate a school and only pay tuition;
 - iii. changing tuition patterns;
 - iv. Federal Impact Aid (This is the only form of local education revenue in the state.);
 - v. transportation grants;
 - vi. small school grants; and
 - vii. current weights.
 - viii. Note: In the proposal, bidders must include the specific type of data they will require to conduct their proposed solution.
 - f. An evaluation of the relationship between district size and various weighting factors.
 - g. An evaluation of the impact of current funding supports over and beyond basic state education dollars:
 - i. Federal dollars that target support at historically disadvantaged populations, including ELLs and children who live in poverty, over and beyond state dollars.

- ii. Small school and small school merger grants that provide extra resources to small schools and the interaction with weighting factors.
 - iii. Transportation aid, and any relationship between grant size and population density.
 - iv. Special Education funds that provide additional resources to students who require additional supports in both the current funding structure and under the funding changes adopted in 2018 Act 173.
- h. An evaluation of the census based funding formula adopted in 2018 Act 173 and determine if it should be adjusted in any one year based on school population characteristics.
 - i. A model of three different strategies for addressing population density in the context of the Vermont funding formula. The model results should include an assessment of the financial impact for systems at each quintile of density for each change.
 - j. A database of inputs and outcomes together with a statistical model that predicts the effect of various funding weights on quality and equity. Evaluate statistical interactions between poverty, ELL status and population density. Provide descriptions of predicted effects, in both technical and lay language, of shifting weights.
 - k. A summary of finding and recommendations for how weights and/or the current funding formula should or shouldn't be modified to address the goals of the study outlined.
 - l. Additional variables or analysis as deemed necessary by AOE throughout the project shall be discussed for inclusion in the final report.
4. The contractor shall submit a draft of its findings and recommendations to the Agency of Education no later than October 1, 2019.
 5. The contractor shall be prepared and be available to present the report and findings to the General Assembly in January and February 2020.

General Requirements

Single Point of Contact: All communications regarding this RFP shall be in writing and addressed to the Contact Person indicated on page one of this RFP.

Questions: Any vendor requiring clarification of any section of this proposal or wishing to comment or take exception to any requirements or other portion of the RFP must submit specific questions in writing no later than August 20, 2018. Questions should be e-mailed to shelley.matz@vermont.gov. Any objection to the RFP, or to any provision of the RFP, that is not raised in writing on or before the last day of the question period is waived. At the close of the question period a copy of all questions or comments and the State's responses will be posted to the Vermont Bid System. Every effort will be made to have these available as soon after the question period ends, contingent on the number and complexity of the questions.

Confidentiality: Bidders should be aware that all materials submitted will become part of the

contract file and will be considered public records under the Vermont Public Records Act, 1 VSA Sections 315-320. The Agency of Education prefers that vendors *not* file proprietary information with their bids. If the bidder finds it necessary to include material that the bidder considers to be proprietary, a trade secret or otherwise confidential, the bidder must: (1) clearly designate any information in the response the bidder believes is proprietary as “confidential”; (2) provide a written explanation sufficient to justify each exemption from release under the Vermont Public Records Act, including the prospective harm to the competitive position of the bidder if the identified material were to be released; and (3) include a redacted copy of the response for any portions of the bid that the vendor designates confidential. Under no circumstances can the entire response or price information be marked confidential. Responses so marked will not be considered and will be returned to the vendor. Vendors filing submissions agree that final discretion to release or exempt all material so identified as confidential rests with the Agency.

Acceptance of the Proposal: The State reserves the right to waive minor irregularities in a bidder’s proposal, providing such action is in the best interest of the State. Where the State may waive minor irregularities, such waiver shall in no way modify the RFP requirements or excuse the bidder from full compliance with the RFP specifications. The State reserves the right to request clarification or correction of the proposal, reject any or all proposals received, or cancel the procurement at any time prior to an award. A proposal may be rejected for: (1) the failure of the bidder to adhere to one or more provisions established in this RFP; (2) the failure of the bidder to submit required information in the format specified in this RFP; (3) the failure of the bidder to adhere to generally accepted ethical and professional principles during the RFP process; or (4) for any other reason deemed to be in the best interest of the State. In the event that the State is not successful in negotiating a contract with the selected bidder, the State reserves the option of negotiating with another bidder.

Form of Contract: The contract between AOE and the winning bidder will be required to be in the form of the Standard Vermont State Contract, including but not limited to standard provisions, which can be found at:

[State of Vermont Standard Contract Template 12-15-17](#)

All contracts of the State of Vermont have standard provisions, which are included with this RFP as “Attachment C” and can also be found at:

[Attachment C Standard State Provisions for Contracts and Grants 12-15-17](#)

Exclusive Ownership: Any and all data, surveys analysis, reports, studies and other complete or incomplete work product prepared or developed by the contractor in connection with the contract shall become the exclusive property of the State and will not be copyrighted or resold

by the contractor.

Costs of Preparing Proposals: All costs incurred by the bidder during the preparation of the proposal will be the sole responsibility of the bidder. Unless explicitly stated, the State will not reimburse the bidder for any costs associated with submission of a proposal.

Use of Subcontractors: Bidder is required to provide a list of subcontractors that bidder anticipates using on the job along with lists of subcontractors' subcontractors and the names of insurers by whom those subcontractors are insured for workers' compensation purposes. Include additional pages if necessary. This is not a requirement for subcontractor's providing supplies only and no labor to the overall contract or project.

Submission and Evaluation of Proposals

Proposal Delivery: The method of delivery shall be via email to Shelley Matz, Education Contract and Grant Manager at:

shelley.matz@vermont.gov

E-mail: Proposals shall be delivered via e-mail attachment (Microsoft Word or PDF document) and shall arrive in the e-mail in-box of the above Contact Person no later than **5:00 P.M on August 31, 2018** and should include the project title in the subject line of the e-mail.

Late responses will not be accepted and shall automatically be disqualified from further consideration. Delivery shall be at bidder's sole risk. The Agency is not responsible for technical problems that may delay receipt of the email attachment. Bidder should plan accordingly.

Proposal Format: Use standard 8.5" x 11" document format, single-spaced and use not less than a twelve point font. Write the program proposal in the order given in the below criteria for scoring chart. Address the proposal specifications in the same manner as the criteria for scoring chart, title and number each item.

Proposals responding to the RFP are expected to cover the content listed below.

1. Complete description of the bidder's qualifications, background and experience, including resumes for key staff; description of previous work similar to that described in the Scope of Work performed for similar organizations; and evaluation data and samples of that work.
 - a. Briefly describe or list previous contracts/agreements for similar services performed in the past three years, with a brief narrative describing the nature of services and to whom. Provide a contact person for reference purposes for each contract/agreement.
2. The bidder's understanding of the RFP requirements, including:
 - a. A detailed outline of the plan for addressing each area of work including a detailed description of deliverables for each part; and

- b. Strengths, skills, and approaches that the bidder brings to each deliverable; and
 - c. A description of any perceived difficulties in this project, together with potential and recommended approaches for their solutions.
3. The attached price quotation form includes costs associated with each major scope of work and associated deliverables.
- a. Include a description of the number of “person days” required to fulfill each deliverable.
 - b. Include a description of the number of “person days” required to fulfill the management/oversight needed to produce each deliverable.
 - c. Include a description of other costs to produce each deliverable.

Proposal Evaluation: Proposals will be evaluated by one or more knowledgeable individuals from the Agency of Education. Evaluation will be based upon the bidder’s responses to the sections outlined in the below scoring criteria chart.

Scoring is intended to clarify strengths and weaknesses of proposals relative to one another and to provide guidance to decision-makers. The sum of the scores of the members will become the proposal’s final score.

Award Announcement: The winning proposal will not be announced until a contract is signed and finalized.

CRITERIA FOR SCORING	Total possible points	Applicant Score
1. Quality of Bidder's Experience and Capacity to Perform	40	
<ul style="list-style-type: none"> a. Demonstrated knowledge of Vermont's education funding system. b. Demonstrated knowledge of other state and federal funding streams provided to school districts. c. Published primary research on the education funding formula for various states. d. Demonstrated knowledge of the State of Vermont's school governance structure and its education funding formula. 		
2. Responsiveness to Specifications	40	
<ul style="list-style-type: none"> a. The proposal will include specific methods to accomplish the specific requirements in this work. b. A timeline for completing the project by the ending date and a description of any challenges that are anticipated. c. Response to understanding the need for weights in the funding formula, its complexity, and the goals of equity and affordability in Vermont's funding formula. d. How the bidder will report and evaluate modifications to weighting factors, its assessment of the weights, and how they meet the equity and quality goals. e. The analytical plan presented by the bidder including the identified data and analysis strategy. 		
3. Program Cost	20	
<ul style="list-style-type: none"> a. Total budget reflects the lowest bid received by the State of Vermont and cost is allowable, reasonable, necessary and allocable in relation to the quality of work proposed. 		
OVERALL TOTAL SCORE	100	

A team of qualified individuals designated by the Vermont Agency of Education will independently evaluate each proposal on criteria 1 through 3. A composite score will be computed based on those evaluations. Composite scores will be an essential, although not the sole, element used when selecting the successful bidder.

Price Quotation Form:

This is a request for a fixed price contract.