

## **Academic Instruction for After-School Programs Request for Proposals for Development of Curricula**

Release date: 11/21/03

Intent to bid: 12/10/03 (optional)

Proposal deadline: 1/7/04

MDRC and Bloom Associates invite developers of reading and/or math curricula for students in the elementary grades to submit proposals to design and implement modifications to these curricula for use in after-school programs. Two curriculum developers<sup>1</sup> will be selected to adapt their curricula to the after-school setting and implement them in approximately 50 after-school centers. (Approximately 25 centers will test the reading program and 25 centers will test the math curriculum.) This effort is part of the Development, Implementation and Impact Evaluation for After-School Programs being conducted by MDRC, Public/Private Ventures (P/PV), and Bloom Associates for the National Center for Education Evaluation and Regional Assistance at the U.S. Department of Education (ED).

This request for proposals (RFP) contains the following sections:

- Section A provides information on the 21<sup>st</sup> Century Community Learning Centers program and the MDRC/P/PV/Bloom Associates study;
- Section B provides the tasks and describes the requirements for the content, organization, and formatting of the proposals;
- Section C describes the review criteria and the review process to be used to evaluate submitted proposals;
- Section D lists due dates; and
- Section E provides instructions for the business proposal.

### **A. INTRODUCTION AND OVERVIEW**

The National Center for Education Evaluation and Regional Assistance at the U.S. Department of Education (ED) has funded the Development, Implementation, and Impact Evaluation of Academic Instruction for After-School Programs. The focus of this project is to strengthen the academic component of after-school programs funded by the 21<sup>st</sup> Century Community Learning Centers program (21<sup>st</sup> CCLCs) and to determine whether an enhanced academic component helps students to improve academically as measured primarily by standardized test scores. As

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<sup>1</sup> Notes: Existing curricula such as regular school curricula for use during the school day or supplemental interventions for in-school or after-school use are examples of possible candidates for the adaptation effort called for in this solicitation. The term curriculum “developers” is used interchangeably with curriculum “publishers” throughout this document. Developers may apply for both reading and math if they have developed curricula in each area. If a single organization wishes to propose for both reading and math curricula, they need to submit two separate proposals. This is necessary because two different panels of experts will review the proposals.

of yet, there are few if any “models” of scientifically based after-school curricula for these grantees to adopt. The project is organized in two parts.

Part A. The purpose of this part of the project is to develop and implement two models of academic instruction for students in the elementary grades who attend after-school programs. Bloom Associates, the Part A contractor, will coordinate the developer selection process and will work cooperatively with the developers to ensure the successful implementation of the after-school curricula in school districts around the country.

Part B. MDRC, P/PV, and Survey Research Management (SRM), the Part B contractors, will conduct an impact evaluation to determine whether the reading and math interventions in after-school programs significantly boost reading and math proficiency as measured by standardized test scores and overall academic achievement. They will study the level of student participation in the assigned intervention, as well as other key implementation questions. Section A.4 further explains the research plans.

The purpose of this RFP is tied to Part A, that is, to select developers of proven elementary grade curricula who agree (1) to adapt their reading and/or math materials for use in after-school settings, (2) to help selected sites implement their after-school curricula, and (3) to have their after-school curricula evaluated by the Department’s independent evaluator, MDRC and its subcontractors.

### **A.1. The 21<sup>st</sup> Century Community Learning Centers**

As the pressure for students to meet challenging academic standards grows, parents, principals and policymakers are increasingly turning their attention to the out-of-school hours as a potentially critical opportunity to improve achievement. Indeed, the federal government has been making a substantial investment towards this goal through its funding of the 21<sup>st</sup> Century Community Learning Centers (21<sup>st</sup> CCLC) program.

The 21<sup>st</sup> CCLC program is a state-administered discretionary grant program in which states hold a competition to fund academically focused after-school programs. Under the No Child Left Behind Act of 2001, the program funds a broad array of before and after school activities (e.g., remedial education, academic enrichment, tutoring, recreation, and drug and violence prevention) particularly focusing on services to students “who attend low-performing schools to help meet state and local student academic achievement standards in core academic subjects.” States can make awards to local grantees covering three to five years and may require local entities to provide matching funds. The minimum award amount is \$50,000. A distinguishing feature of after-school programs supported by 21<sup>st</sup> CCLC funds has been the inclusion of an academic component. However, few, if any, curricula have been developed specifically for the after-school setting that have scientifically-sound evidence indicating they improve academic outcomes. For their academic offerings, most local programs do little more than provide homework assistance or offer home-grown academic enrichment activities that are of mixed quality. (Mathematica, 2003)

Evidence based on 21<sup>st</sup> CCLC grantees funded prior to the program becoming state administered indicated that the typical grantee spent about \$1000 per year for each student, operated 3 to 4 separate after-school centers, and enrolled approximately 200 students per center. The average student-staff ratio across the centers was 11 to 1, although the number of students and staff at individual centers varied on any given day. Many 21<sup>st</sup> CCLC administrators

avored hiring schoolteachers. Indeed, nearly two-thirds of all after-school staff members worked as teachers during the regular school day. On the one hand, the use of schoolteachers as after-school staff holds promise for the potential to coordinate after-school activities with the children's in-school learning. On the other hand, teachers oftentimes work only a few days a week at after-school centers and less than the full year; thus, reducing staff continuity within the programs.

The 21<sup>st</sup> CCLC program recently was converted from a federal grant program to a state-administered effort. The information presented here (e.g. average expenditures per student) describes programs funded by the federal grants. Characteristics of the state-administered program are not yet available, however more information about the 21<sup>st</sup> CCLC program can be found on the web site, <http://www.ed.gov/programs/21stcclc/index.html>.

## **A.2. The Need for Stronger Academic Interventions**

Recently released first-year findings from the national evaluation of the 21<sup>st</sup> CCLC program (Mathematica 2003) indicate that, on average, the 21<sup>st</sup> CCLC programs had no effect on participating students' academic achievement, as measured by grades and test scores. Mathematica Policy Research found that "At the elementary school level, reading test scores and grades in most subjects were not higher for program participants.. In addition, on average, programs had no impact on whether students completed their homework." A possible factor is that most academic activities at the evaluation sites consisted of homework sessions in which students received little academic instruction in reading and/or math. In addition, participant attendance was limited and sporadic. Among the centers examined in the study, the average enrollee attended less than two days a week. Also, attendance was usually more frequent at the beginning of the school year and typically declined as the school year progressed. However, analyses comparing the academic outcome of frequent and infrequent participants suggest that increasing attendance alone is unlikely to improve the academic outcomes. Therefore, the low-levels of formal academic instruction offered in these programs and the lack of academic achievement experienced even by the students who attend more frequently, highlight the need for stronger academic interventions. More information about the study can be found at: <http://www.ed.gov/pubs/21cent/firstyear/index.html>

## **A.3. Reading and Math Curriculum Development**

The demand for after-school curricula has already resulted in efforts to identify or develop academic programming resources for after school programs. These efforts, though, are untested and limited in scope (<http://www.afterschool.org/resources.cfm#7>). The Department is interested in developing two interventions for use in after-school programs to be used in a rigorous evaluation effort. *The curricula materials are not to be developed from scratch. Instead, developers shall adapt and extend their proven reading or math curricula for use in after-school programs. These proven curricula might now be in use as regular school curricula during the school day, or designed as supplemental interventions in-school or after school hours.*

The two after-school curricula (one for reading, one for math) shall contain the following features:

- **Materials consistent with evidence-based research on effective models for reading/math improvement.** In order to maximize the benefits of the extracurricular reading and math programs, their content and instructional strategies should be

consistent with evidence-based research on reading and math and its implications for instruction.

- **Student assessment integral to the program.** The developer shall incorporate appropriate diagnostic tests to determine children's individual needs and to monitor student progress to inform instruction. A reliable and valid teacher-administered assessment tool is essential and should be included as part of this proposal. In addition, the instructor guidance must clearly link assessment findings with appropriate student materials.
- **Content geared to struggling students at multiple levels.** For purposes of the research, the sample may focus on students in a subset of the elementary grades (e.g. Grade 2-5), however developers should develop a program that spans K-5. Within each grade level, children's reading/math skills will vary and most are likely to have proficiency below grade level. Therefore, the interventions should contain materials geared to struggling students.
- **Instruction in small-group format.** This is not a 1:1 tutoring program. Instead, instruction should be planned for small-group formats. Offerors should indicate what size groups have been shown to be appropriate for their existing curriculum—and what they would recommend for the after-school adaptation. Groupings will be determined by the students' instructional needs.
- **Lessons of up to 45 minutes duration.** After-school programs will incorporate the enhanced academic curriculum into the existing structure of snack, sports, and/or other activities. Developers should assume that their curriculum would cover up to 45 minutes of the longer program time.
- **Lessons and exercises that are self-contained within each after-school session.** Any after-school curricula must be mindful of differences between the school-day setting and the after-school environment. Given the voluntary nature of attendance, other offerings and student obligations after school, it is unlikely that after-school program participation will be consistent, although in the study special efforts will be made to raise attendance above the usual levels. Therefore, individual lessons that rely extensively on their continuation over multiple after-school sessions are unlikely to be effective. Materials should be presented in a format suitable for this context.
- **After-school curriculum that can stand alone.** If the developer has an in-school curriculum, the new after-school curriculum may be tested in some schools where students are taught using the developer's in-school curriculum during the regular school day. It may also be tested in other places. For this reason, the after-school materials cannot depend upon coordination with in-school lessons or materials.
- **After-school program reinforces student learning.** Regardless of the curriculum used during the school day, development of the after-school curriculum will need to build-in strategies to support student learning in context. Even in the absence of detailed knowledge of the in-school curriculum being used, the after-school lessons will need to be placed in a context that considers information about the student's progress in school.

In preparing the new after-school curriculum, developers shall keep in mind the following list of considerations:

- **Content and delivery must be highly engaging for students.** Because the program is at the end of a school day, attendance is voluntary and students often have other after-school options, the content of the programs should be as engaging as possible. Academic support that feels like “more school” may not attract and sustain student attendance.
- **Materials must be appropriately challenging and tied to standards.** The after-school educational instruction should be appropriately challenging with respect to typical expectations for students at this level and clearly tied to standards-based objectives.
- **Materials should be appropriate for students from diverse economic and cultural backgrounds.** The after-school programs to be studied will serve elementary school children in schools with a high percentage of students from low-income families. The curriculum should appeal to students from a variety of cultures, as well. The study may include students who are English language learners, however the instruction shall be configured so that the materials can be presented solely in English.
- **The curriculum must fit the likely skills and capabilities of the after-school staff.** After-school programs are likely to have staff members who are certified teachers, as well as some staff who are para-professionals. Centers selected for the study will be encouraged to recruit and hire school-day teachers who are familiar with the in-school curriculum and the students in the building. However, a mix of staff should be assumed. In addition, such staff members are unlikely to have substantial time to prepare for their after-school sessions. Therefore, materials must be exceptionally easy-to-use.

If developers are unfamiliar with the after-school environment, they are encouraged to consult experts in this field and possibly include them as consultants. This partnership will help ensure that the existing curriculum is adapted in a manner that is appropriate for after-school centers.

#### **A.4. The Evaluation**

The purpose of the evaluation is to test the effectiveness of the new reading and math curricula for after-school programs. During school year 2005-6, the curricula are to be implemented in approximately 50 after-school centers in approximately 25 school districts. Half of the centers will implement the math curriculum and half will implement the reading curriculum. Within each center, students enrolled in the centers will be randomly assigned to receive the new curriculum (the program group) or to a control group that will receive the usual center services, which typically involve homework help and/or other after-school program activities such as recreational or enrichment activities. We anticipate approximately 2,000 students will be served by the two interventions.

MDRC and P/PV will conduct a study to examine the effects of the new after-school reading and math programs on (1) reading and math proficiency as measured through standardized achievement tests, (2) general academic achievement, (3) homework completion, (4) engagement in school as measured by attendance, classroom behavior, and disciplinary action,

etc. A context study will also examine whether the curricula are being implemented consistent with their design, whether the teachers are sufficiently trained, and the extent to which the after-school intervention activities are coordinated with the regular school day instruction. A participation study will examine the extent to which students participate in the new academic intervention and other after-school activities (at the center and elsewhere). It will document the difference in services received by those given access to the new programs and those participating in the regular program of the study centers.

Data collection plans for the evaluation cover both the program and control groups in the sample and include: background information on the characteristics of students and the teachers in the study centers, a multi-day field research visit to each after-school center in the study, survey of school-day teachers and parents, and analysis of student achievement as measured by specially administered tests as part of the study. Data will be collected during the implementation period (school year 2005-6) and a project report will be issued in 2007. Effects of the new after-school academic programs will be estimated by comparing the academic experience of students in the program group (given access to the new academic curricula) with that of students in the control group (who have access to the regular after-school program of centers in the study).

## **B. TECHNICAL SPECIFICATIONS**

This portion of the RFP provides information on the tasks to be undertaken and their anticipated timeline. It also provides direction on what each proposal shall provide in terms of content, how it shall be organized, and formatting requirements. Any proposal that does not meet the requirements of this section will be disqualified from further consideration. Note that the technical proposal will be limited to 50 pages. (See section B.3.3 for more detail).

### **B.1. Statement of Work**

Each of the two developers selected (one for reading, one for math) shall implement their curriculum in 5 after-school centers each during the pilot test (school year 2004-5) and 25 centers each during the implementation year (school year 2005-6). For planning purposes, bidders should assume that the curriculum will be tested in up to four classrooms at each center with 10-15 students per classroom. This means there will be up to 20 reading and 20 math classrooms in the pilot test and up to 100 reading and 100 math classrooms during the full-scale implementation. The number of districts, sites, classrooms/teachers, and students to be assumed for planning purposes are summarized in Table B1, below.

**TABLE B1.**  
**SUMMARY OF DISTRICTS, CENTERS, CLASSROOMS, AND STUDENTS INCLUDED IN THE**  
**PILOT TEST AND FULL IMPLEMENTATION**

	<b>PILOT TEST:</b> <b>School Year 2004-2005</b>	<b>FULL IMPLEMENTATION:</b> <b>School Year 2005-2006</b>
Number of School Districts	~2-3 to pilot Reading curriculum ~2-3 to pilot Math curriculum	~12-13 to test Reading curriculum ~12-13 to test Math curriculum
Number of After-School Centers	5 to pilot Reading curriculum 5 to pilot Math curriculum	25 to test Reading curriculum 25 to test Math curriculum
Number of Classrooms/Teachers	Up to 20 to pilot Reading curriculum Up to 20 to pilot Math curriculum	Up to 100 to test Reading curriculum Up to 100 to test Math curriculum
Total Number of Students	Up to 300 to pilot Reading curriculum Up to 300 to pilot Math curriculum	Up to 1000 to test Reading curriculum Up to 1000 to test Math curriculum

The project requires the close collaboration between the developers and Bloom Associates to ensure a smooth implementation and effective test of the curricula. This will involve the following tasks:

**Task 1 – Develop Reading or Math After-School Curriculum**

The offeror shall prepare an adaptation of the existing elementary reading or math curriculum that is appropriate for use in after-school centers. The after-school curriculum shall include student activity materials, teacher guides, and all accompanying resource materials. The offeror should propose a development process that is consistent with the deliverables and timelines shown in Exhibit B2 (later in the RFP) and the text below.

While it might be ideal to have the full year curriculum ready at the time the pilot begins in the fall of 2004, this may not be possible. In fact, there may be some benefit to learning from the early pilot experience and using this information to inform the development of later sessions. In light of this, the following schedule has been established for delivery, review, revision, and pilot testing of the curriculum:

A draft of half of the materials shall be delivered to Bloom Associates by July 15, 2004. The project's Technical Panel, ED staff, and members of the project team will provide review comments within 10 days. A revised draft version, including student activities and teacher materials shall be delivered by August 30. These materials will be introduced to the teachers and administrators at the training conference in September.

The remaining materials shall be delivered to Bloom Associates by October 15, 2004. The developer shall receive review comments within 10 days. A revised draft version shall be delivered to Bloom Associates by November 15, 2004. The developer shall deliver these remaining materials to the after-school centers, along with any implementation instructions needed by the administrators. All materials shall be pilot tested during the school year 2004-2005.

A schedule for revising the materials following the pilot test and delivery of draft final materials to be used in the full implementation during school year 2005-2006 is shown in Exhibit B2.

To clarify terms:

- Step 1-- *Draft curriculum materials* are submitted for initial review
- Step 2—Based on that review, *revised draft curriculum materials* are prepared for use in the pilot test
- Step 3—Following the pilot test, *draft final materials* are prepared for use during the full implementation/evaluation

Offerors are asked to respond to this schedule in two ways. First, their proposals should be based on this schedule of deliverables. In addition, developers are welcome to propose an alternate schedule for delivery, review, pilot testing and revision of materials and to justify any modification to the schedule that they are requesting. However, the deadline for draft final materials is not negotiable because the full implementation begins in Fall, 2005.

In terms of grade levels to be pilot tested, the Department has not made a firm decision at this time as to whether the pilot will test curriculum for all grades (K-5) or will focus on just a subset of the grades (e.g. Grades 2-5). Offerors are asked to indicate whether they would be prepared to deliver curriculum for all elementary grades in time for the pilot test. In addition, developers are asked to explain which grades they would recommend for inclusion in the pilot, if a subset were to be selected.

The offeror is expected to provide all materials needed by teachers, students, and District Coordinators (see below) to implement the after-school curriculum during the pilot test and full implementation.

#### Review by the Technical Panel

The Department of Education requires that a Technical Panel composed of reading experts to advise on the reading curriculum and math experts to advise on the math curriculum be assembled for this project. Their role will include:

1. Review and rating of the developers' proposals
2. Review of draft materials (July 2004 and October 2004)
3. Review of the pilot test experience and developer's suggested revisions (January 2005 and Spring 2005)

#### **Task 2—Help Recruit Sites**

Developers will be asked to introduce the project team to key decision-makers at the district and/or building levels where their existing elementary curriculum is being implemented, as well

as other districts. The developers may be asked to send an introductory letter, follow-up with phone calls to a selected group, and answer questions from prospective sites. Where applicable, we hope to build on the good relationships that the developers have with the Districts and elementary schools that have adopted their materials previously. We will be looking for districts that have after-school centers in operation—we will not be piloting or testing the curriculum in new centers. This help in recruiting sites will be needed for the pilot phase and the full implementation.

### **Task 3—Prepare Materials and Participate in Teacher Training**

In addition to curriculum materials (teacher manuals, guides, etc) prepared in Task 1, the offeror shall develop teacher training materials to be used at the training conference prior to the pilot test (September, 2004). These materials shall be revised for use at the teacher training conferences prior to the full implementation, which will begin in the fall of 2005.

Bloom Associates, the implementation contractor, will be responsible for organizing and paying for travel, lodging, compensation for time, and training space for teachers, District Coordinators, and other project personnel being trained in the interventions. The current plan is to hold one national training for approximately 40 teachers (20 for each intervention) just prior to the pilot test (in September, 2004) and up to three regional training sessions prior to full implementation in Fall 2005, each attended by one-third of the approximately 200 teachers (100 per intervention) in the study; one on the west coast, one in the south, and one on the east coast. We estimate that each training session will take 2 days for teacher training. If your curriculum has different training requirements from these, please describe them. The offeror should describe the type of teacher training they normally provide and what they recommend for this project.

The offeror shall design the training and provide all materials and training staff and shall pay for transportation and lodging for its own training staff. The timeline for delivery of training materials is shown in Table B2. The approach to training after-school staff should be consistent with the requirements of the project and must be described in detail in the proposal.

### **Task 4—Prepare Materials and Participate in Training for District Coordinators**

Bloom Associates will recruit and pay for a half-time coordinator for the approximately 25 Districts, which may have two-to-three after-school centers participating in the demonstration phase. The District Coordinators will be recruited from among school district staff members who are already familiar with the school district administration, teachers and student populations; an understanding of the reading or math curricula in use during the school day; a knowledge of the structure and operation of the after-school programs that exist in the district; experience in working with teachers as a coach or mentor; and an interest in receiving additional training and participating in this national project. Where appropriate, we will ask the developers to suggest individuals they have worked with previously in the District. If there is someone who has had responsibility for introducing the curriculum or monitoring its implementation during the school day, he/she may be willing and able to oversee its expansion into the after-school programs.

The developer shall provide implementation resource guides for use by the District Coordinators so that they will be able to monitor implementation and provide support for the after-school staff. District Coordinators should be prepared to provide training to new teachers, in case of

turnover. They should also be equipped to judge fidelity of implementation and provide support to after-school teachers, as needed.

Bloom Associates will be responsible for organizing and paying for travel, lodging, and training space for the District Coordinators. The developers shall help plan the training conferences and provide workshops at the conference directly related to the implementation of the after-school curricula. Developers shall pay for the cost of transportation and lodging of its own training staff; such funds are not included in the Bloom Associates budget.

The current plan is to train the coordinators on the day prior and day following the two-day national training for teachers just before the pilot test (September, 2004). Prior to full implementation in Fall 2005, the District Coordinators will spend one day in advance and one day following the three regional teacher training sessions described above.

In addition, all District Coordinators from the pilot test sites will come together in January 2005 and coordinators from all sites will assemble in January 2006 for a national conference. At these mid-year conferences, coordinators will receive additional training that responds to issues raised during the site visits and questions handled by the Help Desk (see Task 7). The mid-year conference will reinforce the training that was received and keep the demonstration on track throughout the full year. The District Coordinators will have an opportunity to provide feedback from the field, offer suggestions for further training or curricular revisions, and benefit from peer support.

#### **Task 5 – Conduct Pilot Test of the After-School Curriculum**

Bloom Associates will be responsible for the design of a pilot test of the after-school curriculum during the school year 2004-2005. The curriculum developer will be consulted in terms of the pilot test design and shall be responsible for installing the curriculum at five centers drawn from two or three school districts. The pilot phase will simulate the actual implementation as closely as possible. In each of the five centers, up to four teachers in classrooms with 10-15 students will be selected. Across all centers, a maximum of 300 students will participate in the pilot for reading and 300 for math. (See Exhibit B1)

During the pilot test, curriculum developers shall assist Bloom Associates in monitoring the fidelity and quality of implementation by conducting two joint site visits to all of the participating pilot programs. These two-day visits to each program are in addition to any on-site coaching or consultation that the developers wish to provide during the pilot phase.

The developer shall submit a report on the initial pilot implementation to Bloom Associates by January 30, 2005. At this point, the project's Technical Panel will review the curriculum materials and receive the developer's recommendations for revisions. In addition, the Panel members will provide their suggestions for improvements. In the spring of 2005, the developer shall submit a report on the full pilot phase and the Panel will review the remaining materials. At that point, the Panel will recommend revisions prior to the full implementation in fall, 2005. The offeror's approach to pilot testing and revisions must be described in detail in the proposal, including the number of anticipated in-person site visits and other types of consultation to be provided. Developers shall assume the cost of travel, food and lodging for their staff when they travel to the after-school centers.

### **Task 6 – Conduct Site Visits to After-School Centers**

During the full implementation, curriculum developers shall again assist Bloom Associates in monitoring the fidelity and quality of implementation via multi-day site visits.

Bloom Associates will hire, pay, and supervise field staff responsible for monitoring the quality and fidelity of the implementation of the intervention by after-school centers. The developers shall help Bloom Associates to prepare instruments or protocols for this purpose. Prior to field visits, the developers shall train the Bloom Associates field staff to use these tools.

The developers shall accompany Bloom Associates staff on visits to five of the after-school centers during the 2005-2006 academic year. Developers shall assume the cost of travel, food and lodging for their staff when they travel to the after-school centers. Site visits will average 2 days per center. A total of 10 person-days of time on-site should be anticipated.

### **Task 7 –Ongoing Technical Assistance**

To ensure high-quality implementation of the interventions, the after-school centers will require ongoing technical support. Bloom Associates will maintain weekly contact with the District Coordinators; at the outset, the curriculum developers should be prepared to participate in these calls, as well.

In addition, Bloom Associates will establish a Help Desk where site staff can obtain technical assistance by phone or on-line to address implementation issues as soon as problems arise. Before contacting the Help Desk, we will encourage all parties to refer questions to their District Coordinator. If Bloom Associates staff cannot answer the question, it will be referred to the developers for their assistance. Such questions might include, for example, what modifications to the instructional plan are permissible or what additional resource materials are available to meet a student's particular learning needs.

The offeror should assume that up to 25 days of technical assistance might be requested during the pilot phase and up to 50 days during the full implementation, in addition to the site visits (Task 6).

### **Task 8 – Management Plan**

The offeror shall design and execute a plan to manage the work of the contract and communication with Bloom Associates. This will include a production time line for revisions of the curriculum materials and preparation of the other deliverables specified in this RFP. The management plan shall include the submission of written monthly progress reports to Bloom Associates. The monthly progress reports should include sections on major activities of the prior month and upcoming month, broken down by task, and issues or concerns.

Developers shall attend a kickoff meeting scheduled within two weeks after contract award and shall review the management plan at that meeting. The meeting will be held in Washington, D.C. so that representatives from the Department of Education can attend.

Note that the offeror will not be responsible for the following:

- The offeror will not pay the after-school teachers to deliver the curriculum or the District Coordinators to supervise its implementation. The teachers will be paid from

local funds; the Coordinators will be paid by Bloom Associates to assume these responsibilities.

- The offeror will not organize or manage the training conferences; however the offeror will help design the training, prepare training materials, and provide workshops at the conference. Bloom Associates will be responsible for organizing and paying for travel, lodging, and training space for the trainees. Developers shall pay for the cost of transportation and lodging of its own training staff; such funds are not included in the Bloom Associates budget.
- The offeror will not decide which students will participate in the pilot test or the full demonstration; they will be assigned by lottery (at random) under the direction of MDRC and P/PV.
- The offeror will not be responsible for data collection (including for example, administering standardized tests, collecting enrollment forms, conducting interviews, or gathering school data).
- The offeror will not analyze or have access to the data (prior to public release), nor write evaluation reports.

## B.2. Schedule of Deliverables

Table B2 provides the anticipated timetable for the delivery of products and the completion of the task works described in the statement of work.

**Table B2. Schedule of Activities and Deliverables: 2004**

<b>Date</b>	<b>Task</b>	<b>Activity</b>	<b>Deliverable</b>
February 2004— within 2 weeks of award	8	Attend kickoff meeting in D.C.	Management plan
February 2004 to July 2006	8	Project management	Monthly progress reports
February to September 2004	2	Help recruit sites for pilot	Letters and phone calls where requested
March 2004	1	Develop after-school curriculum	Curriculum outline, updated production schedule, and sample lesson(s)
July 15, 2004	1	Develop after-school curriculum	Draft—first half of materials (including student activities, teacher materials and resource guide for administrators)
August 1, 2004	3,4	Training for teachers and District Coordinators	Draft—Agenda, handouts, and facilitator notes for Training
August 30, 2004	1	Develop after-school curriculum	Revised Draft—first half of the materials
August 30, 2004	3,4	Training for teachers and District coordinators	Revised Draft—Agenda, hand-outs, and facilitator notes for Training
September 2004	3,4	Deliver Training to teachers and District coordinators prior to pilot	
<b>OCTOBER 2004</b>	<b>5</b>	<b>BEGIN PILOT TEST</b>	
October- December 2004	5, 7	Conduct joint site visit (with Bloom Associates) to all centers, provide technical assistance	Recommended site visit protocol and observation forms; Final version prepared by Bloom Assoc.
October 15, 2004	1	Develop after-school curriculum	Draft—second half of materials
November 15, 2004	1	Develop after-school curriculum	Revised Draft—second half of the materials

**Table B2 continues on the next page**

**Table B2 (continued). Schedule of Activities and Deliverables: 2005-2006**

<b>Date</b>	<b>Task</b>	<b>Activity</b>	<b>Deliverable</b>
January 2005	1,5	Pilot test, Meet with Technical Panel	Report on initial pilot implementation and suggested revisions to first half of materials
February 2005 to September 2005	2	Help recruit sites for full implementation	Letters and phone calls where requested
January-May, 2005	5,7	Conduct second joint visit to after-school programs, provide technical assistance	Recommended site visit protocol & observation forms; Final prepared by Bloom Assoc.
January, 2005	4	Training for District coordinators: Mid-Year Conference	Agenda, handouts, and facilitator notes
April/May, 2005	5	Pilot Test, Meet with Technical Panel	Report on pilot and suggested revisions to second half of materials
July 15, 2005	1	Develop after-school curriculum	Draft final version of materials for full implementation
August 1, 2005	3,4	Training for Teachers and District Coordinators	Draft agenda, handouts, and facilitator notes for training
August 30, 2005	3,4	Training for Teachers and District Coordinators	Revised agenda, handouts, and facilitator notes for training
September 2005	3,4	Deliver Training to teachers and District Coordinators at up to 3 Regional Training conferences	
<b>FALL 2005</b>		<b>BEGIN FULL IMPLEMENTATION</b>	
October-December 2005	6, 7	Conduct first-semester joint site visits, provide technical assistance	Recommended site visit protocol and observation forms
January 2006	4	Training for District coordinators: Mid-Year Conference	Agenda, handouts, and facilitator notes
January-May 2006	6,7	Conduct second-semester joint site visits, provide technical assistance	Recommended site visit protocol and observation forms

### **B.3. Content, Organization and Format of Proposal**

Offerors shall follow the proposal format detailed in this section. Each offer shall consist of two separately packaged proposals: a technical proposal and a business proposal. All information necessary to judge the technical soundness and management capabilities of the offeror shall be contained in the technical proposal. The business proposal shall follow the instructions found in section E.

#### **B.3.1. Content of Proposal**

This section aims to clarify what is expected in the offeror's technical proposal. The successful developer is expected to demonstrate in the proposal a clear plan for the development of the proposed interventions. Simply restating the requirements of this RFP will not be sufficient.

In addition to preparing a proposal that is responsive to the timeline and other requirements of this RFP, offerors are encouraged to suggest technical improvements to the work. These proposed modifications should be clearly identified and will be subject to negotiation.

The July 2005 deadline for completion of the curriculum is not flexible. The project must be completed within the timeframe stated because subsequent MDRC/PPV evaluation activities rely on having the interventions ready for full implementation in school year 2005-2006.

#### **B.3.2. Organization of Technical Proposal**

The technical proposal shall be organized into the following sections:

- Abstract;
- Table of contents;
- Introduction;
- Statement of work (task narrative);
- Management plan;
- Institutional capabilities;
- Staff qualifications; and
- Appendices

Specific requirements for each section are discussed in greater detail in the following paragraphs.

##### **B.3.2.1. Abstract**

The abstract is limited to two pages and must include (at a minimum) the name and title of the offeror and contact information, as well as brief descriptions of the proposed after-school curriculum, information about the existing elementary curriculum upon which it is based, evidence of that curriculum's effectiveness, and the implementation plan, including plans for adapting the curriculum to an after-school context, pilot testing, training teachers and District Coordinators, and supporting the implementation.

##### **B.3.2.2. Table of Contents**

The table of contents will provide an easy means to locate each of the sections of the proposal.

### **B.3.2.3. Introduction**

The introduction shall present the offeror's concept of the purposes, methodology, and products of the project and shall include a short summary of the offeror's qualifications and unique strengths related to project tasks. It shall also outline the available evidence of effectiveness for the developer's existing elementary curriculum, with examples of studies and samples of the curriculum to be included in an appendix to the technical proposal.

### **B.3.2.4. Statement of Work**

The technical response to the statement of work section shall provide detailed discussion of how tasks outlined in section B of this RFP are to be carried out. It should expand upon each of the tasks, including a discussion of procedural issues related to completing each task. The comprehensive plan for carrying out each task shall identify staff members who will play a major role in its completion.

### **B.3.2.5. Management Plan**

This section should detail the offeror's overall management plan, including the production plan for developing the after-school curriculum, as well as lines of authority, coordination, and communication within the offeror's organization.

The offeror shall describe the management control system that will be used internally for planning, scheduling, budgeting, managing, and reporting on all phases of the contract. This portion of the proposal must demonstrate an effective management system that enables the contractor to complete tasks on schedule and within budget. The system shall include procedures for: coordinating and controlling project personnel and tasks, ensuring adherence to schedules and deadlines, ensuring high quality products and outcomes, identifying potential problems early, and maintaining close communication with Bloom Associates.

All key personnel, including staff and consultants, shall be identified by name, title, and their position in the project's management structure detailed in an organization chart. This chart shall depict clearly the lines of authority and responsibility for all persons and organizations involved in the conduct of this project, including time commitments over the specified period. This section also shall include a project management chart depicting the timelines for all major tasks and subtasks. Included in this chart shall be the start and completion dates for each task, as well as intermediate dates for precursor steps and draft deliverables, as appropriate. Staff responsible for each task shall also be identified in the chart.

### **B.3.2.6. Institutional Capabilities Statement**

The statement of institutional capability should demonstrate that the offeror has the sufficient institutional resources to deliver the products and services requested. It should furthermore describe the offeror's experience and competence in developing reading or math curricula and implementing such curricula on a large scale. This portion of the proposal should describe the developer's organizational experience with similar projects and demonstrate understanding of the nature of the requested tasks.

### **B.3.2.7. Staff Qualifications**

All staff shall have qualifications appropriate for the tasks they are to perform. Include brief descriptions of the qualifications of key personnel, with resumes in a separate appendix. Resumes of proposed staff are limited to 3 pages each and include only information sufficient to demonstrate that personnel possess training and expertise commensurate with their duties.

The proposed project director and senior staff must have demonstrated the ability to meet deadlines, to produce high-quality products within budget, and to keep the Bloom Associates team informed of, and involved in, major decisions or events that are likely to affect the project's performance or products.

### **B.3.2.8 Appendices**

The following materials should be presented in the appendices:

- Description of the existing elementary curriculum, along with sample materials and assessment tool(s)
- Evidence of effectiveness of the existing elementary curriculum.  
Effectiveness of the existing version of the curriculum should be based on either experimental evidence (i.e. random assignment into a treatment or control group) or quasi-experimental studies that compared the performance of students enrolled in the curriculum to an appropriate comparison group.
- Resumes of proposed staff

### **B.3.3. Format of Proposal**

The technical proposal (text plus all figures, charts, tables, and diagrams) is limited to 50 pages, where a page is 8.5 in. x 11 in., single sided, with 1 inch margins at the top, bottom, and both sides. All text must be vertically spaced at space-and-a-half or single space. Font size must be 12-point or larger. The page limit does not apply to the title page, the table of contents, the two-page abstract, the appendices containing resumes, studies of effectiveness, and examples of curriculum, or the cost proposal. Any materials submitted outside of the 50-page proposal (other than the exceptions noted) will not be reviewed.

**Please note that if a single organization wishes to propose for both reading and math curricula, it needs to submit two separate proposals. This is necessary because two different panels of experts will review the proposals.**

## **C. EVALUATION FACTORS FOR AWARD**

This section sets forth procedures and guidelines that Bloom Associates and the review panel will use in evaluating the proposals submitted in response to this RFP.

### **C.1. Evaluation Process**

The process of selecting developers for the project will have three phases. This section sets forth procedures and guidelines that Bloom Associates and review panel members will use in evaluating the proposals submitted in response to this RFP.

First, Bloom Associates will assess the information provided and determine if the proposals are responsive to the instructions in this RFP. If so, proposals will be submitted to the Technical Panel selected by the U.S. Department of Education for review.

Second, the Panel will review the information in the developers' proposals. Each proposal will be reviewed by at least two members of the project's expert panel who will complete written evaluations of the proposal, identifying strengths and weaknesses related to each of the review criteria provided in section C.2. Reviewers will independently assign a score for each criterion and an overall score for each proposal they review. Based on the scores assigned by the reviewers, an average score for each proposal will be calculated and a preliminary rank order prepared.

Those whose proposals are deemed to have the highest merit, as reflected by the preliminary rank order, may be asked to provide additional written information in response to questions from the panel. In addition, the offeror may be asked to participate in a question-and-answer session. It is anticipated that these sessions will be scheduled during the week of January 19, and will be held via teleconference.

Third, the U.S. Department of Education will make the final choices about the developers who will participate in the project, with advisement from the expert panel.

Proposals will be judged primarily on the technical plan although price will also be a factor. Cost sharing in either the development of the curriculum and/or the training, pilot testing, and implementation of the curriculum could be a method by which the offeror presents a bid that is competitive on price. Developers have an incentive to cost share in this effort because the resulting curriculum and materials will be owned by the developers (rather than the Department of Education) and developers can begin selling them to interested after-school programs after sites are selected for the full implementation in school year 2005-2006.

### **C.2. Review Criteria**

Proposals will be evaluated against the evaluation factors specified below with each criterion weighted as indicated for a total of 100 points.

1. Quality of proposed intervention (55)
2. Institutional capability (20)
3. Staff qualifications (15)
4. Management approach (10)

Each of these evaluation factors is discussed in more detail in the following sections.

### **C.2.1. Quality of Proposed Intervention (55)**

Reviewers will evaluate the offeror's attempt to make a well-reasoned and compelling case for the fit of their curricula to the needs of the after-school study. This should include a strategy for curriculum modification that is complete and clearly delineated and that incorporates sound methods.

#### **A. Appropriateness of the curriculum for an after-school setting (20)**

- Proposal illustrates how the modified curriculum will address all of the criteria in Section A.3, above.

#### **B. Evidence of effectiveness (15)**

- The developer has strong evidence that the existing version of the curriculum is effective with low-income, low-performing populations. Evidence of effectiveness should be based on either experimental evidence (i.e. random assignment into a treatment or control group) or quasi-experimental studies that compared the performance of students enrolled in the curriculum to an appropriate comparison group.

#### **C. Understanding of the need, scope, and purpose of the project, including plans for: (20)**

- Preparation of after-school curriculum and supporting materials, including assessment tools that are linked to curriculum materials
- Assistance with site recruitment for the project
- Developing training materials for teachers, as well as District staff responsible for supporting the implementation
- Delivering training of District Coordinators and after-school teachers for the pilot and implementation year
- Pilot testing during School Year 2004-2005 and making needed revisions
- Participating in site visits to assess fidelity and provide support
- Provision of technical assistance throughout the pilot and implementation year, including availability to answer questions received by the Help Desk.

### **C.2.2. Institutional Capability / Past Performance (20)**

- Resources adequate to meet all of the needs of the contract
- Relevant experience in administration of related or comparable activities

### **C.2.3. Staff Qualifications (15)**

- Staff qualifications match responsibilities
- Staff have adequate breadth and depth of experience
- Availability of proposed staff and time commitments

### **C.2.4. Management Plan (10)**

- Effective plan of management that ensures proper and efficient administration of the project

- Adequate organizational mechanisms and procedures for managing the work
- Efficient organization of staff, with roles depicted in an organizational chart
- Clear lines of authority and responsibilities
- Proposed scheduling of activities for timely completion of tasks
- The ability to meet deadlines and the flexibility to respond to project timelines
- Plan for quality control

**D. DUE DATES**

<b>Date</b>	<b>Activity</b>
December 10, 2003	Letter of intent due (optional)
January 7, 2004	Proposals due
January 19-23, 2004	Possible question and answer sessions
January 26-30	Department of Education selects developers

**Questions.** Offerors may direct questions to Susan Bloom, Project Director for Part A, at [sbloom96@aol.com](mailto:sbloom96@aol.com) or (914) 472-2816.

**Letter of intent.** A letter indicating a potential offeror’s intent to submit an application is optional but encouraged. The letter of intent should be emailed by December 10, 2003, to Bloom Associates’ Project Administrator, Jill Philipson, at [jillphilipson@earthlink.net](mailto:jillphilipson@earthlink.net). The letter of intent is not binding; it will allow us to estimate the potential workload to plan the review of proposals. In addition, we will email answers to questions that are of general importance to all bidders who submit a letter of intent.

**Proposals.** As specified in section B.3, each offeror is required to submit a written proposal in response to this RFP. Written proposals are due by noon (Eastern Time) on January 7, 2004. Written proposals should be submitted via e-mail or hard copy to the following locations:

*E-Mail:* Written proposals submitted via e-mail should be attached as a Word document (cost proposals can be submitted as an Excel document) to an e-mail message and sent to Jill Philipson at the address [jillphilipson@earthlink.net](mailto:jillphilipson@earthlink.net).

*Hard Copy:* Written proposals submitted as hard copy must be received at the following address by noon (Eastern time) on January 7, 2004. Six copies shall be provided if proposals are not submitted via e-mail.

Send copies to: Jill Philipson, Project Administrator  
 Bloom Associates  
 56 S. Flagstone Path Circle  
 The Woodlands, Texas 77381  
 Telephone contact: (832) 928-3371

**Contract Award** is anticipated by January 30, 2004.

## E. BUSINESS PROPOSAL INSTRUCTIONS

The contract may be structured as either a fixed-price contract (with payments keyed to deliverables) or a cost-reimbursement contract (with a payment cap). The form of the contract will be subject to negotiation with the successful bidders. However, the business proposal must include the following information:

1. A statement of the total costs that will be incurred by the developer in preparing the after-school curriculum and participating in the project. The total costs should include all of the tasks and deliverables described in this solicitation. Proposed developer effort level should be separated into the three major project activities (i.e. development activities prior to the pilot phase, pilot phase efforts including revisions, and implementation phase). Level of effort can be expressed as number of personnel hours or percent full time equivalent.
2. A statement of the amount of funding requested from the government to defray *some* of these costs.

At a minimum, developers are asked to offer materials to pilot-test and full-implementation study sites at no cost. Developers also have an incentive to share the actual cost of the development and implementation efforts because the resulting curriculum and materials will be owned by the developers (rather than the Department of Education), and because developers can begin selling them to interested after-school programs as soon as sites are selected for the full implementation in school year 2005-2006.