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July 19, 2021

TO: Interested Persons

FROM: Representative Julie McCluskie, Chair
Legislative Interim Committee on School Finance

SUBJECT: Request for Proposals to Conduct a Study to Analyze Methods of Measuring Student Economic Disadvantage

Summary

The State of Colorado, acting through the Legislative Interim Committee on School Finance (interim committee) requests qualified individuals or firms to submit proposals for conducting a study to analyze methods of measuring student economic disadvantage pursuant to Section 2-2-2003, Colorado Revised Statutes (C.R.S.), enacted in [House Bill 21-1325](#). This Request for Proposals (RFP) presents the scope, standards, objectives, and various requirements pertaining to the study in order to assist individuals or firms in the preparation of proposals.

Procedural Summary

Issuing Office – Schedule for Submittal – Deadline. All proposals to conduct the study must be submitted no later than 10:00 a.m. on Friday, August 6, 2021, to:

Legislative Interim Committee on School Finance
c/o Natalie Mullis
Director of Research
Colorado Legislative Council
200 East Colfax Avenue
State Capitol Building, Room 029
Denver, CO 80203-1784

Each proposal must contain a cover sheet signed by the respondent. Respondents mailing proposals must allow sufficient time to ensure delivery within the submittal deadline. Late or faxed responses will not be accepted. Respondents are requested to submit proposals electronically to lcs.director@state.co.us and schoolfinance.ga@state.co.us, as well as send five copies of their proposal in a sealed package clearly marked with the respondent's name and the words: "RFP – POVERTY STUDY." Technical questions related to this RFP may be directed to Marc Carey at (303) 866-4102 or Anna Gerstle at (303) 866-4375

The tentative overall schedule is as follows:

1. RFP Release Monday, July 19, 2021
2. Proposals Due 10 a.m, Friday, August 6, 2021
3. Interview with Chair and/or Committee Consideration Monday, August 9, 10, & 11, 2021
4. Selection of Successful Respondent No later than Monday, August 16, 2021
5. Contract with Successful Respondent Finalized No later than Wednesday, September 1, 2021
6. Study Completed No later than Monday, January 3, 2022

Revisions or Clarifications

If it becomes necessary to revise or clarify any part of this RFP, addenda will be provided to each potential respondent who received the original RFP and any other individual who expresses interest in responding to the RFP. It is essential that respondents acknowledge all issued addenda in their submittal.

Ownership of Proposals Received

All material submitted in response to this RFP becomes the property of the Colorado General Assembly. The Colorado General Assembly reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Any restrictions on the use of information contained within a response must be clearly stated in the response, and any such restrictions must be approved by the chair of the interim committee. Submission of a proposal indicates acceptance by the respondent of the conditions contained in this RFP.

Respondents that plan to use proprietary material or information must clearly identify the portions of the study that will be conducted using proprietary material. The chair of the interim committee shall make the final determination in advance of awarding the contract as to whether any part of the study

may be completed using proprietary information or whether any information is considered proprietary. All respondents, including those using proprietary material, must describe in detail their proposed plan for conducting the study and the processes involved.

Respondent's Costs

The State of Colorado is not liable for any costs incurred by respondents as a result of submission of a proposal pursuant to this request.

Award of Contract

The chair of the interim committee shall select the vendor in consultation with available members of the interim committee and a representative of the Department of Education, and in accordance with sections 5.0 through 5.3 of this RFP. The chair of the interim committee in consultation with available members reserves the right to reject any or all proposals. Proposals that do not contain at least the information required by sections 4.0 through 4.6 of this RFP will be deemed nonresponsive and will not receive further consideration. The contract will be awarded to the respondent whose proposal is most advantageous to the State of Colorado. Notification of a successful respondent is expected to be made by **Monday, August 16, 2021**. The final contract must be entered into no later than **Wednesday, September 1, 2021**.

Contract

In addition to standard state contract provisions, the contract negotiated with a successful respondent must incorporate this RFP, the successful proposal, and any additional methodological information that may be required.

The schedule and method of payment shall be determined pursuant to negotiations between the chair of the interim committee and the selected respondent and shall be included in the contract. If the respondent intends to subcontract any part of its responsibilities to another individual or firm, the respondent must also identify the subcontracting individual or firm and their qualifications in its response to this RFP.

Insurance

The contractor will be required to submit certificates showing the following minimum coverages prior to start of work:

Standard Workers' Compensation and Employer's Liability, including occupational disease, covering all employees in the amount required by state statutes.

Comprehensive General Liability Insurance, with minimum limits of \$1 million per occurrence and in aggregate.

Comprehensive Auto Liability Insurance with a minimum limit of \$1 million per accident.

The certificates must name the State of Colorado as additional insured and must be furnished within 10 working days after receipt of a contract award. All insurance must include provisions preventing cancellation without 30 days prior notice by certified mail to the Legislative Council's Director of Research. Insurance specified in this section must include coverage for acts or omissions of any subcontractors.

1.0 **Introduction**

- 1.1 The Public School Finance Act of 1994 includes a formula for funding all 178 school districts throughout the state. The formula takes into account a statewide base amount and several district-specific factors, as well as additional funding for at-risk students.
- 1.2 Beginning in FY 2021-22, section 22-54-103(1.5), C.R.S. defines at-risk students as the greater of:
- the number of district pupils eligible for free or reduced-price lunch; or
 - the percentage of pupils in grades one through eight who are eligible for free or reduced-price lunch, multiplied by district pupil enrollment.
- 1.3 The 73rd General Assembly of the State of Colorado passed House Bill 21-1325, establishing the interim committee to study school finance issues during the 2021 and 2022 legislative interims and to recommend a program to encourage low property wealth school districts to increase their education mill levies with the assistance of state matching funds. The bill was signed into law by the Governor on June 30, 2021.
- 1.4 Section 2-2-2003 (2), C.R.S., requires that the committee issue a request for proposals and, no later than September 1, 2021, contract with a third-party vendor to study methods of measuring student economic disadvantage and the data and systems alignment needed to incorporate those measures into the state's school finance formula. The study must be completed no later than January 3, 2022.
- 1.5 The chair of the interim committee, in consultation with the interim committee members and the Colorado Department of Education, will select the vendor to complete the study.

2.0 **Scope of Work**

- 2.1 **Methodology and schedule.** The response to the RFP must contain a plan detailing the contractor's proposed methodology and schedule for completing the study within the established deadline. Any additional information regarding methodology must be provided prior to the signing of the contract and will be incorporated into the contract.
- 2.2 **Progress reports.** The contractor shall provide regular progress reports to the interim committee and respond promptly to questions from committee members and legislative staff. Following completion of the study, the contractor must be available to make at least one presentation, as requested by the interim committee, the House or Senate Education Committees, or the Joint Budget Committee.

- 2.3 **Budget.** The interim committee has an estimated budget for the study that may not exceed \$60,000.
- 2.4 **Approaches for measuring student economic disadvantage.** Approaches for analyzing or identifying student economic disadvantage may include, but are not limited to:
- direct certification;
 - direct certification with the inclusion of Medicaid;
 - free and reduced-price lunch eligibility with hybrid approaches;
 - economic disadvantage measures at census block group level; and
 - other, more accurate approaches taken by other states to measure student economic disadvantage.
- 2.5 **Analysis.** For each approach for measuring student economic disadvantage, the study must include the following:
- the availability of data by school district, census block group, or other relevant geographic boundaries;
 - the distributional effects for school district shares of the state count of low-income students;
 - barriers to accessing data, including technology and data-sharing limitations among agencies that may use the data; and
 - the approach's potential to for meeting the principles and policy objectives described in paragraph 2.6.
- 2.6 **Principles and policy objectives.** The study must evaluate each method's potential for meeting principles and policy objectives, including the following:
- ensuring the most accurate count possible of students experiencing economic disadvantage;
 - maintaining an individual student indicator of economic disadvantage;
 - differentiating among levels of economic disadvantage;
 - decreasing the administrative burden on schools and school districts to collect data and the burden on students and families to prove eligibility;
 - allowing for Colorado's long-term ability to identify longitudinal student achievement trends;
 - allowing for coordination across agencies and their use of indicators for economic disadvantage for public program eligibility;
 - ensuring student privacy and confidentiality of student records; and
 - ensuring the approach is inclusive of all students, including those who are homeless or lack documentation.
- 2.7 **Data system costs.** The study must determine the estimated costs of linking data across systems that are maintained by different state agencies. For example, the cost of system upgrades that would be needed to match student records with records of other assistance programs in which students are enrolled.
- 2.8 **Online forms.** The study must analyze benefits and drawbacks of making the eligibility form secure and accessible online for families.

- 2.9 **Final Study - Deadline.** The contractor shall provide the completed study of the approaches studied and analyzed to the interim committee, the Joint Budget Committee, and the education committees of the General Assembly by **January 3, 2021**.
- 2.10 **Final Study - format.** The final report must allow members of the General Assembly to evaluate each approach in isolation or as a combination of approaches, according to the principles and policy approaches specified in paragraph 2.6.

3.0 **Qualifications**

- 3.1 Individuals or firms considered for this contract must meet the minimum qualifications described below. Individuals or firms shall provide sufficient information related to these requirements to enable evaluation of their performance.
- 3.2 The contractor must have expertise or demonstrated experience assisting states in examining measures of economic disadvantage for the purposes of school funding.
- 3.3 The contractor must be available and committed to completing the study and submitting the final report to the interim committee, the Joint Budget Committee, and the education committees of the General Assembly by no later than the deadline.
- 3.4 The assigned individuals and the contractor must not have any bias or conflict of interest that would affect the outcome of the contractor's report. The assigned individuals or their immediate family members must not be members of the Colorado General Assembly, employees of public school districts, or members of school boards.
- 3.5 Respondents must accept the conditions of this RFP, including but not limited to the conditions set forth in the Procedural Summary section of this RFP.

4.0 **Proposal Format**

- 4.1 Proposals must be written and need not be limited to the points listed in this request, but may include and cover any matter the respondent believes is relevant to the consideration of the proposal. Proposals must include, at a minimum, the following sections, presented in the order listed. All information included in the proposals may be used to evaluate any component of the response.
- 4.2 **Basic Proposal Information.** This section must include the name and address of the respondent, a brief description of the firm or organization (such as the date the entity was formed and how long the entity has engaged in this type of service), contact name, position of the contact person, telephone number and fax number for the contact person, e-mail address for the contact person, and a list of recent similar projects. This section must also include the names, titles, addresses, and phone numbers of any person or persons retained by the respondent to lobby the Colorado General Assembly. This section must also include any research conducted by the firm that was ultimately presented to the General Assembly or any committee of the General Assembly.

- 4.3 **Description of the Project and the Respondent's Approach.** This section must describe in detail the respondent's understanding of the work to be performed and the method by which the respondent proposes to complete the study. The description must be presented in an overview format and also detailed by anticipated phases of work. The proposal must also describe what involvement of state employees, if any, will be required.
- 4.4 **Personnel.** The proposal must identify the individuals who will be assigned to complete this study. This section must list the names of the staff to be assigned, and the qualifications, specific expertise, and experience in related economic studies. If the respondent intends to subcontract any part of its responsibilities to another individual or firm, the proposal must identify all subcontracting individuals or firms and their qualifications.
- 4.5 **Itemized Study Budget.** This section of the proposal must include the total study cost and an itemized cost for individual components of the study. The total cost may not exceed \$60,000.
- 4.6 **References.** The proposal must include a list of references of clients for whom this type of service has been provided in the past. The references provided will be considered in the evaluation of responses. The name of the client, contact name, address, telephone number, and type of organization must be provided for each client in addition to a brief description of the service provided. Please expect these references to be contacted.

5.0 **Selection Process**

- 5.1 Individuals or firms failing to meet the minimum required qualifications will not receive further consideration. The most qualified respondents will be asked to interview with the chair of the interim committee and may be asked to present to the interim committee.
- 5.2 Individuals or firms selected for an interview must appear with at least one principal who will have responsibility for the project. Up to three representatives from the responding firm may be present for the interview. Interviews may be conducted remotely.
- 5.3 The Director of Research, on behalf of the chair of the committee, will negotiate with the firm chosen as most qualified. In the event an agreement cannot be reached, the Director of Research will negotiate with the next ranked firm on the committee's prioritized list. The Director of Research will continue this approach until such time as an agreement is reached.

6.0 **Evaluation Criteria**

- 6.1 Proposals will only be considered from qualified respondents demonstrating the ability to conduct a study of methods for measuring student economic disadvantage. Respondents and their respective proposals will be evaluated in accordance with specific criteria, including but not limited to the following:
- 1) quality and clarity of the proposed methodology for conducting the requested research;
 - 2) breadth and depth of experience in conducting economic analyses;
 - 3) qualifications and availability of proposed staff;

- 4) project budget; and
 - 5) succinctness of proposal.
- 6.2 Sample work provided by the respondent will be an added factor in the final evaluation of a firm's qualifications.

7.0 **Information Provided to the Contractor**

- 7.1 Legislative Council Staff will provide the contractor with background on the recent legislative changes related to at-risk students and recent work completed by a prior Legislative Interim Committee on School Finance from 2017 through 2019. Additional information concerning school finance in Colorado may be found at <http://leg.colorado.gov/agencies/legislative-council-staff/school-finance>

8.0 **Reports and Documents Property of the Colorado General Assembly**

- 8.1 All information collected by the contractor shall be the property of the Colorado General Assembly. The Colorado General Assembly retains the exclusive right to release any and all parts of the report. The reports prepared by the contractor, computer disks, tapes, and any other materials or analysis pertaining to the cost-of-living study shall also be the property of the Colorado General Assembly. The Colorado General Assembly reserves the right to reproduce and distribute any and all materials collected or prepared by the contractor.

9.0 **Schedule of Payments**

- 9.1 Payment for services will be provided according to the terms of the contract.