KnowledgeWorks Foundation
Request for Qualifications (RFQ): 000101
Title: Evaluating Ohio Implementation of Personalized Learning to Reduce Learning Loss

JUNE 2022

<table>
<thead>
<tr>
<th>RFQ Number</th>
<th>000101</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFQ Description</td>
<td>Evaluating Ohio Implementation of Personalized Learning to Reduce Learning Loss</td>
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<tr>
<td>Federal Award Identification Number</td>
<td>S425U210035</td>
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<tr>
<td>Federal Award Description</td>
<td>American Rescue Plan – Elementary and Secondary School Relief Fund (ARP-ESSER)</td>
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<tr>
<td>Grant Name</td>
<td>Ohio Personalized Learning Network</td>
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<tr>
<td>RFQ Issue Date</td>
<td>June 20, 2022</td>
</tr>
</tbody>
</table>

Introduction
KnowledgeWorks, in partnership with the Ohio Department of Education, is in the early stages of engaging in state-level implementation support of personalized learning as a means to reduce pandemic-fueled learning loss. As part of this work, KnowledgeWorks embeds research, data analysis, and continuous quality improvement offerings to support and augment our district and school work by enabling ongoing engagement, evaluation, and feedback loops with key stakeholders so that data is both actionable in real-time and provides information on student and systems impact. In particular, we’re looking to ascertain impact on and outcomes for marginalized and resilient learners. To this end, KnowledgeWorks is seeking a qualified research partner to help lead the data collection and analysis activities that will help us answer key questions and support our partners’ continuous learning and improvement as they implement personalized learning across the state.

Organization
KnowledgeWorks is a national nonprofit organization advancing a future of learning that ensures each student graduates ready for what’s next. For more than 20 years, we’ve been partnering with states, communities and leaders across the country to imagine, build and sustain vibrant learning communities. Through evidence-based practices and a commitment to equitable outcomes, we’re creating the future of learning, together.

Background
While versions of personalized learning have been around since the turn of the century, putting this approach into practice at a systems level has been underway for less than a decade. The modern resurgence in popularity for this approach comes as a response to the urgent need to improve students’ postsecondary and career readiness, foster deeper learning and more equitable learning outcomes for each student and reduce the learning loss that was generated by the pandemic.
In 2014, KnowledgeWorks released the *District Conditions for Scale: A Practical Guide to Scaling Personalized Learning*, based on interviews with close to 30 leaders in the field. The *District Conditions* began to lay a blueprint for personalized learning. Starting with the district as the unit of change, KnowledgeWorks continued to build a systems-level approach in which policy conditions, vision-setting and supports at the state level complement multi-district initiatives.

KnowledgeWorks is engaged in state-level implementation support of personalized learning in Arizona, North Dakota, South Carolina, Nevada and now Ohio. To support the growth of personalized learning in Ohio and systemic change across the state, the Ohio Department of Education has recently extended and expanded its partnership with KnowledgeWorks to create the Ohio Personalized Learning Network.

Through this network, the Ohio Department of Education and KnowledgeWorks seek to:

- Transform systems to support the growth and sustainability of high-quality personalized learning; and
- Create a system of professional development designed to provide multiple entry points to meet the unique needs of schools and districts

KnowledgeWorks’ approach is built on a personalized learning foundation that includes:

- **Prioritizing an equitable system of learning** for each learner, with an emphasis on the most marginalized and resilient learners
- Recognizing that a volatile present calls for a **strategic use of foresight** and future-oriented solutions
- **Advancing practices that assist learning communities and states** to meet the current uncertainties by building resiliency and flexibility into the system
- Creating a broader, **more well-rounded view of student achievement** that focuses on academic rigor and skills, as well as addresses future-ready skills, student agency and whole child indicators
- **Forging strong partnerships** with state, community, district, school and classroom leaders, and customizing timing, order and types of support to meet their needs and interests
- **Assessing impact** throughout the engagement and using both formative and summative data to improve outcomes or make course corrections as necessary
- **Building the capacity of educators and leaders** to sustain long-term progress toward the vision

See the “Customized Supports” section below for more information about how KnowledgeWorks is
working with the Ohio Department of Education to build the foundation for personalized learning and reduce learning loss for Ohio students.

**Personalized Learning Defined**

To specify both what personalized learning “looks like” and how it moves from the classroom to the system, the framework below first outlines what the approach looks like in the learning environment, followed by a set of systems-level commitments and aspirations to ensure sustainable personalized learning for all students.

In a personalized learning environment:\(^1\):

1. Students daily make important decisions about their learning experiences, how they will create and apply knowledge and how they will demonstrate their learning.

2. Assessment is a meaningful, positive, and empowering learning experience for students that yields timely, relevant and actionable evidence.

3. Students receive timely, differentiated support based on their individual learning needs.

4. Students progress based on evidence of mastery or competency, not seat time.

5. Students learn actively using different pathways and varied pacing.

6. Strategies to ensure equity are embedded in the culture, structure and pedagogy of schools and education systems.

7. Rigorous, common expectations for learning are explicit, transparent, measurable, and transferable.

**What is personalized learning?**

At the system level, personalized learning is when members of a learning community work together to create engaging educational experiences that are customized to each learner’s strengths, needs and interests. Students have voice and ownership over how, what, when and where they learn and connections to community and real-world experiences are a priority. In a personalized learning environment, students learn actively using different pathways and varied pacing that does not result in tracking or other forms of ability grouping. The systems-level focus on the learner’s experience and readiness ensures each learner has equitable opportunities to acquire the future-ready skills, knowledge and dispositions so they graduate ready for what’s next.

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Customized Supports

At the district-level, the use of the District Conditions for Scaling Personalized Learning, District Conditions Navigation Tool, opportunity analysis and tiered systems of support build the capacity of district and school leaders and educators.

District-Level Supports

Individual District Supports

KnowledgeWorks’ District Conditions for Scale establishes the fundamental building blocks on which a high-performing personalized learning system is based. Combined with the meta themes, a set of ideas that stretch across the conditions and serve as the connective tissue tying the conditions together, these serve as the basis for KnowledgeWorks’ partnerships with learning communities. The data generated from this tool is presented in a district opportunity analysis that helps districts prioritize conditions and visualize data to make sense of it while sharing it with stakeholders inside and outside the district. Use of this tool year over year provides data to assess implementation by a district while enabling a reprioritization of goals as the data dictates. Finally, KnowledgeWorks uses tiered systems of support, a framework for content aligned to the District Conditions for Scaling Personalized Learning, as a professional learning continuum.

District Network Supports

In each state, KnowledgeWorks builds intentional networks designed to sustain the work beyond any single policy, leader or grant so that the positive effects of student-centered learning are embedded seamlessly into the system. The networks and supports are different in each state but may include: design teams consisting of district and school leaders; convenings to learn and collaborate with other districts as they progress in their unique implementation journeys; use of the opportunity analyses to deliver professional development and technical assistance; and sharing student-centered best practices focused on systemic implementation, growth and accountability. An education fellowship approach (made up of key school and district leaders and/or Educational Service Center staff) to support additional professional and leadership development is in early stages in some of the states and may also be an element in Ohio. The fellows build the capacity of local leaders to lead implementation and serve as embedded coaches in their districts between convenings.

Project Overview

KnowledgeWorks embeds research, data analysis, and continuous quality improvement (CQI) offerings to support and augment our state, district, and school work by enabling ongoing engagement, evaluation, and feedback loops with key stakeholders so that data is actionable in real-time and serves as a tool in continuous learning and improvement. KnowledgeWorks works to evaluate and document progress towards systemic change and student-level impact through a State Impact Assessment (SIA)
process that incorporates both formative and summative evaluation activities. At its most basic, our SIA approach asks: what was done (and where)? How was it done (and how well)? What impact did it have (and for whom)?

KnowledgeWorks seeks a qualified research partner to help answer the following broad research questions (understanding that the final specific research questions are to be determined between the research partner and KnowledgeWorks):

**Implementation**
What is the progress of implementation of personalized learning practices in participating districts/schools? To what extent have the early stages of personalized learning implementation been undertaken meaningfully and/or with depth? What opportunities and challenges are emerging at the district, school, and classroom levels during the shift to personalized learning?

**Systems**
What shifts in policy, structures, and/or organization in support of personalized learning implementation are occurring within districts and schools? What opportunities, challenges, and/or needs are being surfaced through these shifts? What resource and structure supports do district and school leaders and staff need to achieve progress in implementation of personalized learning?

**Outcomes**
How does the shift toward personalized learning impact student-level outcomes, including but not necessarily limited to:

- Student and educator agency
- Sense of wellbeing
- Supportive relationships
- Positive and equitable learning environments
- Competency-based education system
- Deeper learning
- Equity of learning
- Career readiness skills
- Post-secondary outcomes

To be determined with the research partner, but data collection is likely to entail some combination of the following:

- Survey Administration and Analysis: district-level biannual personalized learning implementation surveys of students and school staff for formative and summative assessment (aligned to the outcome areas listed above; note: *the district-level survey instrument is developed, but could be refined with the research partner*); state-level engagement survey of diverse, cross-state stakeholders
Interviews/Focus Groups: with superintendents, principals, district design teams, teachers, students, and parents; formative assessment aligned to District Conditions for Scale

Classroom Walkthroughs/Observations: walkthroughs of classrooms in schools where district design teams support educator professional development around personalized learning practices; formative assessment aligned to District Conditions for Scale

Convening content and artifact capture: biannual convenings of state-level and district-level network participants to share learning, progress, and best practices.

A Partnership Approach
KnowledgeWorks approaches our engagement with an external researcher as a partner in ongoing efforts to improve outcomes for learners, especially our most marginalized and resilient youth. We have data access and practice and policy expertise; you have expertise that complements and deepens ours.

We will work more as partners than grantor and grantee. Meaning, KnowledgeWorks staff will be available to serve as interview sources and set context, help open doors, provide data and artifacts, review instruments and discuss ideas. We are eager to learn about the process and new ways of asking and answering questions as we are in getting to “the” answer. Our writers are eager for stories to help tell and our communications team can support design and dissemination.

The ideal applicant would find this approach aligned, appealing and mutually beneficial.

Expected Activities
Activities within this scope of work would likely include the following elements and activities:

- Reaching out to and negotiating participation agreements, data-sharing agreements and IRB approvals, as necessary, with KnowledgeWorks support
- Integrating feedback on study design from KnowledgeWorks staff and partners
- Collecting quantitative data and analyzing
- Collecting qualitative data, coding and analyzing
- Conducting case studies of high-implementer districts or schools (“micro studies”)
- Producing periodic, short memos on interim findings and sharing with partners
- Assisting in dissemination and sharing results via public-facing reports, webinars, presentation at conferences, or other means
How to Submit Qualifications

By 11:59pm ET on July 24, 2022, please upload materials via https://knowledgeworks.egnyte.com/ul/VO2K5JTk1t

Filenames must include the RFQ number and your organization’s name. Be sure to include the main contact person for your team and her/his/their email address. Please review the following expectations, project details, and directions in order to submit your organization’s qualifications for consideration.

Budget
Expected budget not to exceed $325,000.00

Project Period
August 29, 2022 – June 30, 2024

Application Materials
Submit the following materials, separate documents preferred:

1. Cover page that contains the following information:
   a. Organization’s legal name and address
   b. List the RFQ number as: 000101
   c. Contact information (name, title, mailing address, email address, phone number) for:
      i. The main contact for your proposal
      ii. The main contact for delivering the scope of work
      iii. The main contact for securing the contract
   d. As a potential subcontractor of federal funds, you are required to have a Unique Entity Identifier (UEI) - see instructions at https://knowledgeworks.org/partnership-opportunities/
      i. The registration link is SAM.gov | Entity Registrations
      ii. As a subcontractor, you are not applying directly to receive Federal Funds. You will, however, be conducting certain types of federally required transactions, such as reporting. You may not need to complete a full registration, but you will need a UEI.
      iii. If you are a business, you will need to complete a full registration in SAM.gov | Entity Registrations.

2. Evaluation Proposal to include (but not limited to):
   a. Evaluation plan/approach (possible research questions, methodology, activities, workplan, etc.)
   b. Timeline and deliverables
   c. Management and staffing plan
   d. Communication/dissemination plan

3. Additional narrative of no more than 1,000 words, answering the questions below.

4. Staff expertise/experience—please include résumés/CVs for each person listed in the
management and staffing plan.

5. **Budget and budget narrative using the provided templates; allowable budget categories may include:**
   - a. Personnel (include title, rate and number of hours. Note: PI should not have less than 10% of the total hours on the project)
   - b. Fringe benefits
   - c. Consultant and other contractual items
   - d. Travel
   - e. Materials, supplies and technology
   - f. Other direct expenses
   - g. Indirect costs, overhead allowable up to 10%

6. **Signed Attestation – see attachment**

**Questions to Answer in Narrative:**

1. Some of the core data collection activities for this work may include administering surveys to students and school staff, conducting interviews/focus group discussions, and conducting classroom walkthroughs/observations—important activities that require buy-in from school and district staff. How would you approach building relationships and/or engaging with key school and district stakeholders to garner willing participation and support for these key activities?

2. What expertise/credentials does your organization possess that prepares you to execute the project as described above? Please highlight the extent to which your team has conducted similar analyses and worked in relevant partnerships with another research-oriented entity and partners at multiple levels in the education system.

3. How do your team members’ racial/ethnic/cultural/socioeconomic/linguistic/disability backgrounds or other positionality factors (e.g., role, training, academic discipline) influence the methods you will employ, the lenses you bring to interpret data and how you communicate it to various partners and stakeholders?

**Submission Timeline**

- RFQ distributed June 20, 2022
- Applicant questions answered on a rolling basis, but no later than July 15, 2022
- Proposals due July 24, 2022
- Requests for written clarification sent week of July 25, 2022 (as necessary)
- Decision communicated by August 12, 2022
- Contract finalization by August 26, 2022 (estimated date)
- Work commences August 29, 2022 (estimated date)
Scoring Criteria
Submissions will be scored only if they include all necessary components, as detailed under Application Materials section, and the submitted budget does not exceed the maximum allowance. Submissions that meet these requirements will then be assessed by an impartial evaluation committee based on the included RFQ scoring rubric.

Questions
We ask that you do not directly contact any employee of KnowledgeWorks about this RFQ during the solicitation and review process. Applicants may submit any questions about this RFQ and scope of work any time before July 13, 2022 to KWOppportunities@knowledgeworks.org. Submitted questions will be answered on a rolling basis but no later than July 15, 2022 via an FAQ document, which can be found at https://knowledgeworks.org/partnership-opportunities/.

Background Materials – Framework

- District Conditions for Scale: A Practical Guide to Scaling Personalized Learning
  https://knowledgeworks.org/resources/district-conditions-scale-personalized-learning/

- Student-Level Impact Areas – Construct Overview
  https://knowledgeworks.egnyte.com/dl/1GvLV4EMA0