KnowledgeWorks Foundation

Request for Proposals (RFP) - UPDATED 11/22/2022

November 2022

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Introduction

KnowledgeWorks seeks proposals from qualified organizations or individuals to support the planning and management of an inaugural one-day summer conference highlighting advancements of and opportunities for personalized learning approaches in Ohio schools. With plans for the “Summer Institute” to take place on June 21, 2023 the event will be co-designed by Personalized Learning Specialists based in Ohio’s regional Educational Service Centers (ESCs) and in collaboration with KnowledgeWorks and the Ohio Department of Education (ODE). The vision for the Summer Institute includes keynote speakers, concurrent presentations by school-based teams and opportunities to amplify student voices. With capacity for 100-200 participants, the event will aim to reach schools and districts at different stages of implementing personalized learning with a primary goal of sharing personalized learning practices that are occurring both within and outside of the Ohio Personalized Learning Network.

The RFP includes 6 attachments, including this document. Please verify that you have a complete copy.

Organizational Background

KnowledgeWorks is a national nonprofit 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.

While versions of personalized learning and competency-based learning have been around since the turn of the century, putting these approaches together at a system level has been in practice for less than a decade. The modern resurgence in popularity for these approaches 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 produce future-focused education systems.

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, competency-based learning, an intentional and explicit
combination of the two approaches. 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 now engaged in state-level implementation support of personalized, competency-based learning in Arizona, Ohio, North Dakota, South Carolina and Nevada. Each of these engagements began through a different set of definitional events, are in different stages of implementation and have different approaches to scale and spread.

The work in each of the states is built on a personalized, competency-based learning foundation that includes:

- **Prioritizing an equitable system of learning** for each learner, with an emphasis on the most marginalized learners

- Recognizing that a volatile present calls for a **strategic use of foresight** and future-oriented solutions

- **Advancing policies to 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
Project Overview

In 2022, KnowledgeWorks began a two-year arc of work in Ohio to advance the implementation of personalized learning. This effort includes policy supports, professional development for educators and evaluation.

As part of this work, KnowledgeWorks, in coordination with the Ohio Department of Education, has been building the capacity of 13 Personalized Learning Specialists, each based in regional educational service centers (ESCs), to build the Ohio Personalized Learning Network. Through the Ohio Personalized Learning Network, the ESC Personalized Learning Specialists are recruiting individuals as well as school- and district-based design teams to engage in personalized learning practices through one or more professional learning pathways, including:

- **PersonalizeOH Community** – Online community of practice that connects learner-centered educators from all levels of education. Members of the PersonalizeOH Community can share personalized learning strategies and get advice and support from their peers.
- **EXPLORE** – On-demand, personalized learning resources for educators interested in learning at their own pace, plus regular opportunities to learn from peers also exploring personalized learning.
- **LAUNCH** – Two-year cohort for school and district teams ready to implement transformational personalized learning practices. In addition to the professional learning for school- and district-based design teams, the LAUNCH pathway offers opportunities specific to key roles through additional Professional Learning Communities (Principal and Coaches PLCs).
- **TRANSFORM** – Five-year cohort for districts ready to transform to a more equitable system of teaching and learning by implementing a district-wide system of personalized learning.

These professional learning pathways include a variety of virtual and in-person workshops and convenings, co-designed and co-led by KnowledgeWorks, the Ohio Department of Education and the ESC Personalized Learning Specialists. The Summer Institute will bring together stakeholders from the above-described pathways to share and to celebrate the personalized learning work occurring across the state of Ohio. Sessions offered through the Summer Institute will be organized around the themes outlined in the draft Ohio Personalized Learning Framework:

- Learner Driven
- Flexible Learning Environment
- Authentic Learning
- Evidence of Learning & Feedback
- Optimal Path & Pace

We are seeking qualified organizations or individuals to plan the logistics and lead the execution of the Summer Institute Event, in coordination with KnowledgeWorks, the Ohio Department of Education and the ESC Personalized Learning Specialists. The selected vendor will:

- As needed, refine an event strategy and vision based on goals previously identified by Personalized Learning Specialists, the Ohio Department of Education and KnowledgeWorks.
- Lead naming, branding and promotion of the event, coordinating with KnowledgeWorks, Personalized Learning Specialists and a separate Network Marketing consultant to maximize impact.
- Establish and manage a Call for Speakers process, including proposal requirements, intake, selection, notification and scheduling. Personalized Learning Specialists have a strong network already in place through which to promote a Call for Speakers, but will require support from the
Event Manager vendor on promotion. The selected event management consultant will be expected to coordinate, alongside KnowledgeWorks, with Personalized Learning Specialists and a separate Network Marketing consultant on promotion needs.

- Collaborate with KnowledgeWorks and the Ohio Department of Education to ensure event space, food, room blocks, technology, break-out spaces, etc. are secured.
  - KnowledgeWorks will enter into any necessary sub-contracts and bear the cost of these needs; the selected vendor will not be responsible for these costs.
- Coordinate with KnowledgeWorks to set up registration for the event and communicate event logistics (session schedules, options for travel accommodations, catering, etc.) to participants. For these purposes, the selected contractor will be provided a log-in to KnowledgeWorks’ Cvent account for the term of the contract and be responsible for setting up and managing all Cvent needs, including set-up of a registration website, communication with invitees and guests, etc.
- Identify, coordinate and manage logistical needs surrounding the chosen venue, including capacity, session scheduling, catering, transportation and travel accommodations, presentation/AV technology, etc. in advance of the event, and on and around the day of the event provide on-site support and management of these logistical needs as well as needs related to participant check-in, name tags, etc.
- Collaborate with KnowledgeWorks to identify supplies needed for the event. KnowledgeWorks will order and pay for all necessary supplies.
- Assess opportunities for providing virtual access to the otherwise in-person event. As deemed appropriate and feasible, selected vendor will coordinate and manage hybrid participation opportunities.
- As needed, support promotion of the event, which will be led by Personalized Learning Specialists and a previously-identified consultant who supports all marketing efforts related to the Ohio Personalized Learning Network.
- Establish and manage a process for tracking attendee participation as needed for the Ohio Department of Education to provide certificates of completion for professional contact hour or graduate credit requirements.

This partnership will require the selected vendor to:

- Engage in approximately 2 hours of meetings per week, including weekly meetings with a committee of ESC Personalized Learning specialists and coordination meetings with KnowledgeWorks and the Ohio Department of Education. More frequent and additional meetings may be required as the event approaches.
- Create plans and protocols that will be housed or organized in platforms already in-use by the Ohio Personalized Learning Network, including Google Drive, Cvent, TaskRay, etc.
- Coordinate roles and responsibilities among PL Specialists and the Ohio Department of Education, in coordination with KnowledgeWorks.
- Debrief after the event to identify strengths and opportunities to consider for the next year’s Summer Institute.

Requirements for Submission

KnowledgeWorks will accept responses to the RFP from Nov. 4, 2022 until 11:59 p.m. EST on Nov. 21, 2022. Proposals will be evaluated by an impartial evaluation committee through early December 2022. Successful and unsuccessful candidates will be contacted no later than
Dec. 23, 2022. We request that you do not contact any employee of KnowledgeWorks during the solicitation and review process.

**The deadline for submissions has been extended to 11:59 p.m. EST on Dec. 5, 2022. For consideration, submit materials via [https://knowledgeworks.egnyte.com/ui/SENNBIWJmY](https://knowledgeworks.egnyte.com/ui/SENNBIWJmY) in 8 separate PDF or Word documents.**

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

**Budget**

Costs not to exceed $50,000. The not-to-exceed cost should include travel costs. Required travel will include one or more site-visits to assess logistical needs and overnight travel to manage the event.

Vendor is limited to a 10% indirect rate for this contract. The amount for indirect is included in the not-to-exceed amount, not in addition to it. In order to receive the indirect amount, the selected subcontractor will need to provide documentation substantiating the expenses being charged for these services.

**Project Schedule and Deliverables**

The below-listed interim schedule and deliverables for the 2023 Summer Institute are estimates only, with the exception of the confirmed event date of June 21, 2023. Vendors responding to this RFP are encouraged to map out a schedule based on their own expertise as part of their proposed project plan.

**General**
- **October through December 2022**
  - KnowledgeWorks, the Ohio Department of Education and ESC Personalized Learning Specialists establish a vision, goals and parameters for the June 2023 Summer Institute.
  - Venue selected and confirmed for 2023 event. Venue-based parameters defined.
- **By January 13, 2023** – Kick-off with Event Manager vendor
- **Event Date** – June 21, 2023

**Call for Speakers**
- **By January 31, 2023** – Call for Speakers opened
- **By February 28, 2023** – Speaker proposals due
- **By March 24, 2023** – Proposal reviews complete
- **By March 31, 2023** – Speaker decisions announced
- **By April 21, 2023** – Speaker schedule established and announced

**Registration**
- **February 2023** – Open registration
- **Early to mid-May 2023** – Close registration

**Post-Event**
- **By mid-August 2023** – Event debrief
- **August 2023** – Planning for 2024 event begins
Application Materials
Your proposal must contain the following information and be submitted in separate PDF or Word documents, one for each item detailed below.

1. Cover page that contains the following information:
   a. Organization’s legal name and address
   b. List the RFP number as: 000108
   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)
      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 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. Proposed project plan including:
   a. Key deliverables and timelines – The timelines for interim deliverables and deadlines may vary from those listed in the above but the event date must be June 21, 2023
   b. Management and staffing plan – Please indicate what areas will be handled by what role.

3. Narrative of no more than 400 words per question:
   a. Describe a successful conference-type event that you planned and managed.
   b. How do you approach project management for complex events?
   c. How do you approach conference co-designing among multiple partners?
   d. Describe your experience with event planning and management as well as project management tools and software, including Cvent.
   e. Work like this depends on a strong partnership. What do you need from your clients to ensure projects are successful?

4. Expertise/experience for staff who will be assigned to this project, one paragraph per person, no more than 300 words each.

5. Contact information for three references who can speak to your past work on similar events.

6. Budget– see attached.
   a. Please note that KnowledgeWorks is limited to a 10% indirect rate for this grant, so that is the limit for all subcontractors. The amount for indirect is included in the not to exceed amount, not in addition to it. In order to receive the indirect amount, the selected subcontractor will need to provide documentation substantiating the expenses being charged for these services. Documentation includes scanned copies of invoices paid, as well as timecards or time logs for personnel expenses.
7. Budget Narrative – see attached

8. Signed Attestation – see attached

**Scoring Criteria**
Submissions will be scored only if they include all necessary components, as detailed under Application Materials, 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 RFP scoring rubric (see attached).

**Submission Timeline**
- RFP posted: Nov. 4, 2022
- Questions due: Nov. 11, 2022
- Q&A posted by: Nov. 15, 2022
- Proposals due: Nov. 21, 2022 by 11:59 PM PDT **11:59 p.m. EST on Dec. 5, 2022**
- Interviews, if needed, and reference checks: Dec. 5-16, 2022, times TBD
- Decision communicated by Dec. 23, 2022 (estimated date)
- Contract finalization by January 11, 2023 (estimated date)
- Work commences: January 13, 2023 (estimated date)

**Questions**
We ask that you do not directly contact any employee of KnowledgeWorks about this RFP during the solicitation and review process. Questions regarding this RFP and scope of work should be submitted no later than Nov. 11, 2022 by email to **KWOpportunities@knowledgeworks.org**. Include the RFP number in the subject line of your email. Answers to all questions will be posted by Nov. 15, 2022 at 5 p.m. EST.