



## **Introduction**

[The Region 4 Comprehensive Center \(R4CC\)](#) is a federally funded technical assistance center that provides intensive support in a wide range of efforts designed to improve the quality of educational opportunities for students in Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania. Led by Policy Studies Associates, R4CC collaborates with partners at both the local and state levels.

A current project, the [Maryland Superintendent Academy](#), is designed to support aspiring district leaders prepare for the roles and responsibilities of Maryland superintendents. R4CC is currently working with the second cohort of 20 participants from 16 Maryland school systems. A critical responsibility of superintendents is leading the development and management of a budget for instructional, operational, and capital expenses. This RFP seeks a facilitator to lead a strategic budget session, focused on the operational budget, for cohort two of the Maryland Superintendent Academy.

## **Scope and Expectations for this Engagement**

The facilitator awarded this contract is expected to lead an in-person session for cohort two members in Ocean City, Maryland on November 16, 2023, from 8:30 am – 2:15 pm. The focus of the session will be on strategic development and management of an operational budget. Data and budget plans from at least three Maryland school systems must be analyzed and applied to the learning experience. Content must include:

- Implementing research-based, effective strategies for a superintendent to manage and modify an inherited operational budget.
- Reviewing and applying current, publicly available, Maryland student data to implement strategic budgeting that improves student outcomes.
- Practicing reallocating funding based on an unexpected challenge.
- Discussing trade-offs for decision making.
- Reviewing effective and legal strategies on where to “find” money.
- Developing an operating budget based on current Maryland financial realities, considering Blueprint for Maryland’s Future funding, ESSER funding expiration, etc.
- Providing examples that address urban, rural, and suburban school systems and the diversity of the students in Maryland.

The scope of work will be as follows:

- Participate in one, one-hour virtual meeting with the R4CC team to review expectations and provide an overview of the learning experience for the Academy.
- Respond to all correspondence from R4CC within 24 hours.

- Develop interactive learning experiences and any necessary supporting resources (PowerPoint, handouts, etc.) on assigned topic for the scheduled amount of time. Learning experiences must align to effective practices for engaging adult learners.
- Conduct research and secure required Maryland student data from public sources to support development of content.
- Secure and provide resources needed to facilitate the learning experience. This includes printing, supplies (chart paper, sticky notes, markers, etc.), and materials (books, podcasts, articles, etc.)
- Provide the R4CC team with audiovisual and facility set-up requests at least two weeks prior to the scheduled session.
- Provide R4CC with a headshot and brief biography at least one week prior to the scheduled session.
- Meet with the R4CC team two weeks prior to the scheduled session to review final learning experience and supporting resources. Edits to learning experiences requested by the R4CC team must be completed and approved prior to the scheduled in-person Academy session.
- Provide electronic copies of meeting materials (PowerPoint, worksheets, etc.) at least three days prior to scheduled session so that they can be made available to meeting participants.
- Arrive at the venue at least 30 minutes prior to scheduled presentation to set-up and address any technical issues.
- Confirm that permission has been provided to use any third-party work (images, quotes, videos, etc.) that is copyrighted or published elsewhere that is incorporated into the learning experience.
- Confirm that presenters' names, likenesses, and biographies may be used by R4CC to promote the session and/or Academy.
- Agree to meet the open licensing requirement of the R4CC federal grant: any deliverable developed, in whole or in part, with grant funds must be openly licensed to the public. This requirement applies to any product developed entirely with grant funds, and to any separately identifiable modifications made to pre-existing works (to the extent that open licensing is permitted under the terms of any licenses or other legal restrictions on the use of pre-existing works).

### **Evaluation Factors for Award**

Selection will be based on the extent to which the proposal shows that the offeror meets each of the following criteria, weighted as shown for a total of 100 possible points.

- *Expertise in facilitation - 15 points:* Demonstrated use of effective practices for engaging adult learners.

- *Expertise and experience in school system budgeting – 25 points:* Experience with the development and management of school district budgets and the decisions/trade-offs faced when engaging in strategic budgeting.
- *Expertise in Maryland funding formulas and understanding of the fiscal implications of the Blueprint for Maryland's Future – 25 points:* Knowledge of the unique system that Maryland uses for funding schools and of how the new *Blueprint* affects the decisions local district leaders will need to make.
- *Expertise in working with diverse populations – 25 points:* The offeror must have expertise in working with a diverse composition of identities (i.e., people of color, various disciplines, and lived experiences), and the demonstrated capacity to employ non-traditional approaches to professional learning that will challenge aspiring leaders from a critical perspective. This learning process includes the acknowledging and unlearning of biases as well as implementing approaches that responsively work with minoritized communities to equitable ends.
- *Price – 10 points:* The contract will be awarded to the responsible offeror whose proposal is most advantageous to R4CC, with price and other factors considered.

## **Proposal**

The proposal must be clearly structured into the following sections:

- *Cover Page.* A page showing the name, title, email address, and phone number of the primary point of contact.
- *Organizational Qualifications:* A summary description of your organization's experience relevant to the scope, expectations, and selection criteria above.
- *Staff Qualifications:* A bio and 2-page resume of the lead facilitator and any other proposed staff, demonstrating relevant expertise and experience.
- *Approach:* A narrative that shares your approach to this project.
- *Budget and Staffing:* A total budget showing line items for personnel, travel, materials, and other necessary costs and fees, along with the anticipated number of person-hours for each named individual.
- *Work Samples:* Up to three work samples that demonstrate relevant expertise and experience. These can include a combination of internal work products, interim findings, and public/published reports (e.g., PowerPoint presentations, briefs, articles, etc.).

Please limit your proposal to no more than eight single-spaced pages excluding cover page, budget and staffing, work samples, and resumes.

**RFP Process**

<b>Activity</b>	<b>Date(s)</b>
RFP issued	September 14
Proposals due	5:00 p.m. ET September 29
Facilitator selected	October 3

R4CC reserves the right to reject any or all proposals, as well as to accept a portion of submitted proposal if deemed in the best interest of the Maryland Superintendent Academy.

Additional questions? Contact Diana Joyce, [djoyce@policystudies.com](mailto:djoyce@policystudies.com)