



**Office of Education Improvement and Innovation**

**TITLE:** Title I MI Excel Statewide System of Support Technical Assistance Grant

**PURPOSE:** The Elementary and Secondary Education Act (ESEA) as amended by the No Child Left Behind Act of 2001 (NCLB), requires state education agencies to develop and implement a support system for schools identified for improvement, corrective action, or restructuring (MI Excel Schools). The Statewide System of Support (SSoS) is the Michigan Department of Education's (MDE) system that meets these federal requirements.

**PROPOSAL DUE:** Original, seven (7) copies, and an electronic version on CD/DVD ROM delivered to:

Bill Witt, Office of Education Improvement and Innovation, 4<sup>th</sup> Floor, Hannah Building, 608 West Allegan Street, P. O. Box 30008, Lansing, Michigan 48909, by **5:00 p.m. on July 15, 2011.**

**DATE OF ISSUE:** June 15, 2011

## **SECTION I: General Information for the Bidder**

If awarded this Grant, I understand and agree to the following:

### **I-A PURPOSE**

The Elementary and Secondary Education Act (ESEA) as amended by the No Child Left Behind Act of 2001 (NCLB), requires state education agencies to develop and implement a support system for schools identified for improvement, corrective action, or restructuring (MI Excel Schools). The Statewide System of Support (SSoS) is the Michigan Department of Education's (MDE) system that meets these federal requirements.

This Grant will provide fiscal administration, coordination, and support for the SSoS and related activities and services.

### **I-B ISSUING OFFICE**

This Request for Proposal (RFP) is issued for the State of Michigan by the MDE, Office of Education Improvement and Innovation (OEII). The OEII is the sole point of contact in the State for this RFP. All inquiries relating to this Grant should be addressed to:

Bill Witt, Consultant  
School Improvement Support  
Office of Education Improvement and Innovation  
[Wittb1@michigan.gov](mailto:Wittb1@michigan.gov)  
(517) 335-4733  
4<sup>th</sup> Floor, John Hannah Building  
P.O. Box 30008  
Lansing, MI 48909

### **I-C CONTRACT ADMINISTRATOR**

Upon receipt at the OEII of the properly executed Contract Agreement, it is anticipated that the Director of the OEII will identify the person(s) to be the authorized Grant Contact.

### **I-D TYPE OF GRANT**

The Fiscal Agent (successful bidder) will be the Grant Recipient and will be responsible for facilitating the funding mechanism for the services and activities to be supported through this Grant. The Grantee will primarily provide fiscal management for these services and activities as coordinated through the OEII.

## **I-E FUNDING**

The proposal will be awarded with ESEA mandated activities funds; the anticipated total amount of this Grant is up to \$10,000,000 for the first year and up to \$6,000,000 per year after. The award is subject to change based on OEII need. Funding will be effective following the approval of the Grant Award by the Superintendent of Public Instruction. The funding period is twelve months beginning October 1, 2011, and ending September 30, 2012, and in one-year increments thereafter. Based on satisfactory performance and availability of funds, the project and yearly funding may continue up to five years.

## **I-F FUNDING CARRYOVER**

Carryover to a subsequent year is subject to approval and should be budgeted in accordance with subsequent year activities.

## **I-G ELIGIBLE APPLICANTS**

Any Intermediate School District (ISD), Regional Education Service Agency (RESA), or an organization representing ISDs/RESAs with demonstrated experience in providing the services requested, are encouraged to submit a proposal. The Recipient will partner with MDE. **If you plan to submit a proposal, please contact Bill Witt at [wittb1@michigan.gov](mailto:wittb1@michigan.gov) prior to the proposal due date of July 15, 2011, so that the appropriate number of peer review panelists can be secured.**

## **I-H RESPONSE DATE**

To be considered, proposals must arrive at the OEII as specified on the cover page of the RFP. Bidders' mailing proposals should allow mail delivery time sufficient to ensure timely receipt of their proposals. Proposals which are received after the specified due date and time, regardless of the date of postmark receipt, cannot be considered and will be returned promptly to the bidder. Bidders are solely responsible for the timely arrival of proposals at the OEII. Late proposals and proposals submitted electronically or by facsimile will be returned to the applicant **without review.**

## **I-I REJECTION OF PROPOSALS**

The MDE, OEII reserves the right to reject any and all proposals in whole or in part or to negotiate separately with any sources whatsoever to serve the best interests of the State. Additionally, past performance on other grants will be considered when recommendations for the Grant Award are made to the Superintendent of Public Instruction. This RFP is made for information and planning purposes only. The State does not intend to award the Grant solely on the basis of any response made to this request or otherwise pay for the information solicited or obtained.

## **I-J PERFORMANCE REPORTING**

As a condition of receiving funding, the Recipient will provide the MDE, OEII with progress reports describing the project's progress on the approved work plan. The MDE, OEII may place these progress reports on a website. Additional information needed to assist the State in meeting its federal reporting requirements for this program will also be required. Reports may be required by the MDE, OEII at any time. More information on the required reporting can be found in Section II-C. The MDE, OEII reserves the right to suspend or terminate the grant program if there is a lack of progress.

## **I-K ACKNOWLEDGEMENT**

All hard copy and electronic publications including news releases, reports, films, brochures, CD-ROMs, videos, DVDs, or any project material developed with funding from this Grant must be approved by the MDE before dissemination. All products and materials must include the following statement:

*This document was produced through an ESEA Statewide System of Support for MI Excel Schools initiative awarded by the Michigan Department of Education. The opinions expressed herein do not necessarily reflect the position or policy of the Michigan Department of Education, the Michigan State Board of Education, or the U.S. Department of Education and no endorsement is inferred. This document is in the public domain and may be copied for further distribution when proper credit is given. For further information or inquiries about this project, contact the Office of Education Improvement and Innovation, P.O. Box 30008, Lansing, Michigan 48909.*

## **I-L APPLICANT'S CONFERENCE**

A conference call and webinar is scheduled **for June 27, 2011, from 10:00 a.m. – 12:00 p.m.** to discuss with prospective applicants, the work to be performed, and to give the applicants an opportunity to ask questions. The applicants' conference call is for information only. If you wish to participate in this conference call, please contact **Bill Witt at [wittb1@michigan.gov](mailto:wittb1@michigan.gov)**. The OEII retains the right to modify this RFP, if necessary, to comply with laws or ensure a clearer understanding of its content. Any information that changes the content, funding amount, or filing procedures will be posted on the MDE website and mailed only to the persons who notify the MDE, OEII of their intent to submit a proposal.

## **I-M ADDENDUM**

In the event that it becomes necessary for the OEII to revise any objective in Section II, an addendum will be posted on the MDE website and provided in writing to all potential bidders who have notified the MDE, OEII of their intent to submit a proposal.

## **I-N ORAL PRESENTATION**

Bidders who submit a proposal may be required to make an oral presentation of their proposals to the MDE. These presentations provide an opportunity for bidders to clarify the proposal to ensure thorough mutual understanding. The OEII will schedule these presentations, if required.

## **I-O PROPOSAL PREPARATION, FONT SIZE, AND PACKAGING**

The proposal should be prepared simply and economically, double-spaced, with one inch margins and with a font no smaller than Verdana 11 point. Tables must be developed with a font no smaller than Verdana 11 point, but text may be single-spaced. Proposal narratives must be no longer than 30 pages in length. The program budget and associated narrative may be appended. All application pages must be securely stapled. Special bindings and binders should not be used. Applications submitted but not in accordance with application preparation instructions **will be returned without review.**

## **SECTION II: WORK STATEMENT**

### **II-A UNDERSTANDING OF NEED**

The OEII is seeking a Grantee to serve as a Fiscal Agent for activities and services related to the SSoS, and to implement training, technical assistance, and other activities to support continuous improvement in Title I schools identified for improvement, corrective action, or restructuring under the ESEA.

In order to support the development and implementation of the SSoS, the OEII has identified a variety of activities and services that are necessary to achieve goals and objectives of a continuous improvement system. Services and supports funded through this Grant include:

- School Improvement Process Mentor/School Support Teams (approximately 100 schools); typical costs go to support the implementation and management of these teams by a participating organization (historically an ISD or RESA)
- School improvement reviews for schools in their first year of identification
- Data workshop for schools in their first year of identification curriculum surveys
- Leadership coaches/instructional leadership training
- Introduction to Coaching Training (Coaching 101)
- An online school improvement planning tool
- An online school improvement management tool (Case Management Tool)

Such services and activities will be supported through this Grant on an as needed basis. The Grantee will provide fiscal management for these services and activities as coordinated through the Grant Contact at the OEII.

### **II-B OBJECTIVES**

The Grantee will primarily be responsible for facilitating the funding mechanism for access to and services of specialists, experts, and/or staff with unique services necessary for the continued development and implementation of the SSoS. The Grantee, as Fiscal Agent, will coordinate funding of services and activities through the Grant Contact at the OEII. The primary objective of this Grant is to implement fiscal support for selected services and activities related to the SSoS initiative as identified by the OEII.

### **II-C TASKS**

As stated in II-B, the Grantee's primary responsibilities are to serve as Fiscal Agent for the SSoS and related activities. The OEII will direct the service and support priorities of the Grant and the Fiscal Agent will provide fiscal supports as necessary to implement the activities and services.

## **Project Accounting**

The Fiscal Agent is responsible for recording all grant receipts and disbursements. Where appropriate, the Fiscal Agent should maintain budgets for total program activity and the individual activity for participating organization/sub grantee projects funded through this Grant. The Fiscal Agent should establish a separate project account for each grant project. All project receipts and disbursements should be recorded in this account.

## **Reporting**

The Fiscal Agent is responsible for submitting all required reports to the MDE. These reports, at a minimum shall consist of:

1. A detailed annual report of:
  - a. Total program activities and expenditures
  - b. Activities and expenditures by participating organization/sub grantee
  
2. Quarterly updates on:
  - a. Total program activities and expenditures
  - b. Activities and expenditures by participating organization/sub grantee

The Fiscal Agent must ensure that participating organizations/sub grantees understand they are responsible for providing all pertinent individual project information to the Fiscal Agent in a timely manner to allow preparation of the required reports.

## **Disbursing Funds**

Generally, the Fiscal Agent will make all disbursements for the project. All transactions will be recorded in the project account established by the Fiscal Agent. Three levels of maintaining supporting documentation are allowable under this Grant. In accordance with the underlying principle of this Grant, sufficient documentation must be maintained by the Fiscal Agent to allow the Fiscal Agent's external auditor to perform the required fiscal and compliance audit of the Grant Award.

### **Level one documentation**

The Fiscal Agent will maintain requisitions, purchase orders, invoices, receiving reports, and payment vouchers. Under this most controlled option, the Fiscal Agent is generally making all purchases for the participating organizations.

### **Level two documentation**

The Fiscal Agent will maintain original requisitions, purchase orders, invoices, receiving reports, and payment vouchers for direct expenditures made by the Fiscal Agent and will request and maintain from the participating organizations copies of the above expenditure documentation. Under this option the Fiscal Agent is making some purchases on behalf of the participating organization/sub grantee and maintaining level-one documentation for these purchases. The participating organization/sub-

grantee is also making purchases and submitting copies of all supporting documentation to the Fiscal Agent.

### **Level three documentation**

The Fiscal Agent will maintain original requisitions, purchase orders, invoices, receiving reports, and payment vouchers for direct expenditures made by the Fiscal Agent. The Fiscal Agent will reimburse expenditures made directly by the participating organizations/sub-grantees, only after receipt of a detailed report of expenditures by the participating organizations/sub-grantees. This report must include all detail information on the expenditures such as; purchase order numbers, vendor name, invoice number, payment voucher number, date, etc. In accordance with the underlying principles of this policy, these disbursements must be adequately documented so that the Fiscal Agent's external auditor can audit the Grant. In this situation, the external auditor may request the Fiscal Agent to obtain from the participating organization(s) copies of the supporting expenditure documentation needed for their audit testing. The Fiscal Agent and the MDE may periodically ask for such documentation to verify compliance.

### **Inventory Records**

The Fiscal Agent is responsible for maintaining fixed asset records for any items exceeding the capitalization level of the Fiscal Agent. In addition, the Fiscal Agent is responsible for maintaining inventory records for any items as required by the Grant Agreement. When grant assets are located at a participating organization(s), this location should be identified on the Fiscal Agent's inventory records. Verification of assets according to the Fiscal Agent's periodic inventory procedures should include those assets acquired as Fiscal Agents.

If the Fiscal Agent adopts a higher capitalization (or fixed asset inventory) level than they have adopted for their organization, but a level that still complies with the Grant Requirements, the entity that has physical custody of the fixed asset has the responsibility for providing insurance coverage if coverage is desired.

## **II-D REVIEW PROCESS**

All proposals will be reviewed using a structured review system. Award selections will be based on merit as determined by points awarded in accordance with the Review Panel Score Sheet and all relevant information provided in the proposal. Based on this process, the OEII will provide formal funding recommendations to the Superintendent of Public Instruction.

The maximum score for the following criteria is 100 points. The Superintendent of Public Instruction may apply other factors in making funding decisions such as the performance of the Fiscal Agent on previously funded initiatives.

Work Plan	40 Points
Prior Experience/Internal Controls	20 Points
Organization Capacity and Human Resources	20 Points
Project Budget	20 Points

Bidders should refer to Appendix B for the score sheet.

### **SECTION III: Information Required from Bidder**

The bidder's proposal is to be submitted in the format outlines below. Use only the alphabetical numerals and headings listed below, and not the Roman numeral III.

#### **III-A COVER**

The cover page of the proposal must include: (1) the title of the Grant; (2) the organization name and address; (3) the phrase "Authorized Negotiator," followed by the typed name, title, and phone number of the person authorized to negotiate the proposed Grant Agreement with the Department of Education; and (4) the phrase "Submitted with the assurance that this proposal will remain valid for at least sixty days from the due date, by:" followed by the signature, typed name and title, and date of signature of the person authorized to execute legally binding Grant Agreements with the State of Michigan. Bidders may list alternate negotiators in item (3) above.

#### **III-B BUSINESS ORGANIZATION**

State the full name and address of the organization and, if applicable, the branch office or other subordinate element that will perform or assist in performing the work proposed. Indicate whether the organization operates as an individual, partnership, or corporation. If it is operated as a corporation, include the state in which it is incorporated. If appropriate, state whether it is licensed to operate in the State of Michigan.

#### **III-C UNDERSTANDING OF NEED**

State in succinct terms an understanding of the problem(s) as presented by this RFP. Evidence of sufficient understanding should extend beyond a mere restatement or paraphrase of the "Understanding of Need" statement from the RFP. Support this understanding with examples of existing capacity if possible.

#### **III-D WORK PLAN**

Include a narrative summary description of the proposed fiscal services that will be delivered. Make specific reference to the objectives in the RFP and to the fiscal services required. A communication plan must also be included in the work plan.

#### **III-E PRIOR EXPERIENCE AND INTERNAL CONTROLS**

The organization must show the ability to perform as a Fiscal Agent. Proposals must include documentation of the following:

- a. History of sound fiscal oversight
- b. Documented audit integrity
- c. Documented ability to support fiscal components within timelines which may include copies of process flowcharts that may assist with demonstrating fiscal accountability

- d. Documented experience in managing fiscal support for multiple initiatives simultaneously
- e. Documented procedures and protocols for fiscal processes
- f. Copies of standard forms used for financial transactions including: travel expense reimbursement, requisition for purchase orders (if applicable), contract service payment request, contract format for independent contractor, etc.

### **III-F ORGANIZATION CAPACITY AND HUMAN RESOURCES**

The successful applicant must be able to support the project as a Fiscal Agent with personnel who possess talent and expertise in fiscal management. Describe the qualifications of the key personnel who will support the functions of a Fiscal Agent, paying particular attention to the activities and tasks outlined in sections I-A, II-B, and II-C of this RFP. Include resumes for each staff member.

### **III-G BUDGET**

A partial budget and minimal budget details are provided on page 23. Bidders should describe their organization's capacity to manage the budget for which they have completed a Work Plan. Bidders should also complete, to the best of their ability, the remaining sections of the budget. This includes outlining any potential miscellaneous or other expenses, including staff (noting Full Time Employee), indirect, and audit costs. Bidders may also want to take an opportunity to outline any possible in-kind contributions that can be made to the project.

An anticipated amount of \$10,000,000 will be utilized in the first year of the project. The amount will be approximately \$6,000,000 for each year thereafter. Each initiative below will reduce expenses by approximately 30 – 40 percent after the first year. Budget amounts will be negotiated in collaboration with the MDE.

The following services and supports must be budgeted for in the first year:

- Approximately \$250,000 for School Improvement Process Mentor/School Support Teams; typical costs go to support the implementation and management of these teams by a participating organization (historically an ISD or RESA)
- Approximately \$150,000 for school improvement reviews and data workshops for schools in their first year of identification
- Approximately \$50,000 for curriculum surveys
- Approximately \$4.5 million for leadership coaches/instructional leadership training
- Approximately \$1.7 million for Introduction to Coaching (Coaching 101)
- Approximately \$365,000 for contracted School Improvement Consultants
- Approximately \$1.5 Million for an online School Improvement Planning Tool

- Approximately \$250,000 for the School Improvement Online Management Tool

Audits may be at actual cost or included in the indirect. Hardware, software, and any other equipment needed to carry out the objectives of the project must be bid at educational discount prices and are subject to prior approval. Other allowable costs incurred for the benefit of the project could include: development of products and services related to operating the program, travel expenses for project staff, postage, telephone, and supplies when they relate directly to communication, dissemination, and technical assistance needed to operate the project.

**Instructions for completion:**

Bidders who are submitting a proposal for this project should complete the above draft budget demonstrating estimated costs for services outlined within the proposal. This includes providing estimated costs for all budget items listed above for which estimated costs have not been provided. These costs are for services outlined in the proposal for which the potential Grantee would be responsible.

**III-H ADDITIONAL INFORMATION AND COMMENTS**

Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

**III-I APPENDICES**

Include Assurance of Grant Conditions which indicates agreement with grant conditions as specified in paragraphs IV-H – IV-M. Do not include lengthy general lists of publications or other documents unless their inclusion is ESSENTIAL to reviewer’s understanding of your proposal and you made explicit reference to them in the body of the proposal.

**III-J PROPOSAL SUBMITTAL**

The original copy bearing ORIGINAL signatures and seven (7) additional copies (for a total of eight) of the complete proposal must be received on or before **5:00 P.M., July 15, 2011**, by Bill Witt, at the following address:

Michigan Department of Education  
Office of Education Improvement and Innovation  
School Improvement Support  
P.O. Box 30008  
Lansing, Michigan 48909

If shipping by overnight express or UPS, the following address must be used:

Michigan Department of Education  
Office of Education Improvement and Innovation  
School Improvement Support  
Pillar F-19  
608 West Allegan Street  
Lansing, Michigan 48933

## **SECTION IV: CONDITIONS OF APPLICANT**

If awarded this Grant, I understand and agree to the following:

### **IV-A INCURRING COSTS**

The State of Michigan is not liable for any cost incurred by any bidder prior to execution of a Grant Agreement.

### **IV-B GRANTEE RESPONSIBILITIES**

The Grantee will be required to assume responsibility for all activities offered in this proposal whether or not he/she performs them. Further, the State will consider the Grantee to be the sole point of contact with regard to matters, including payment of any and all charges, resulting from the anticipated Grant Agreement.

### **IV-C RELEASE OF INFORMATION/CONFIDENTIALITY**

Grantee initiated publication or news releases of any information pertaining to the Grant Agreement, work performed under the Grant Agreement, products of the work, and materials based upon the products shall occur only with written prior approval of the MDE, OEII.

### **IV-D ACCOUNT AND AUDIT REQUIREMENTS**

The Applicant will maintain a separate accounting of expenditures for this Contract for each fiscal year it is awarded. Funds will only be requested as needed to meet immediate obligations and shall not be drawn for purposes other than those directly related to this Contract. Generally acceptable accounting procedures will be used. The Agency's independent auditor will be made aware of the Contract so that the auditor can review expenditures as required by federal single audit requirements. The auditor must review all contracts over \$25,000. Current employees of the MDE may not be employed or contracted under this Grant.

Expenses charged to this Contract will not be charged to any other state or federal source and should follow federal guidelines including, but not limited to, EDGAR and OMB Circulars A-87 and A-122. This Contract will not be used to supplement mandated state or local costs.

### **IV-E DISCLOSURE**

After the MDE awards a Grant under a RFP, all information in a bidder's proposal is subject to the provisions of the Freedom of Information Act, Public Act 442 of 1976. This Act also provides for the complete disclosure of Grant Agreements and attachments thereto.

#### **IV-F GRANT PAYMENT SCHEDULE**

The payment schedule for any Grant Agreement entered into as a result of the RFP will be negotiated and reflect the restrictions of the funding source. The schedule should show payment amount and should reflect actual work done by the payment dates.

#### **IV-G OWNERSHIP**

Ownership of intellectual property resulting from this Grant shall remain with the MDE, which reserves the right to copyright or patent them, or otherwise protect their integrity or availability for public use. **This stipulation covers recipients as well as sub-contractors receiving funds through this Grant program.**

Ownership of assets purchased through this Grant shall revert back to the MDE at the cessation of the grant period.

#### **IV-H INDEMNIFICATION**

The Grantee, as a condition of the Grant Agreement that may ensue from the RFP, shall indemnify and hold harmless the State of Michigan and its agents and employees from and against all claims, damages, losses, and expenses, including attorney fees arising out of or resulting from the performance of the work, which includes all labor, materials, and equipment required to produce the commodity, construction, and/or service required by the Grant Agreement, provided that any such claim, damage, loss, or expense (1) is attributable to bodily injury, sickness, disease, or death, or injury to or destruction of tangible property (other than the work itself), including the loss of use resulting there from, and (2) is caused in whole or in part by any negligent act or omission of the Grantee, and sub-grantee, anyone directly or indirectly employed by any of them, or any of whose acts any of them may be liable, regardless of whether or not it is caused in part by a party indemnified hereunder.

In any and all claims against the State of Michigan or any of its agents or employees by any employee of the Grantee, any sub-grantee, anyone directly or indirectly employed by any of them, or anyone for whose acts any of them may be liable, the indemnification obligation under this indemnification agreement shall not be limited in any way by any limitation of the amount or type of damages, compensation or benefits payable by or for the Grantee or any sub-grantee under Workers Disability Compensation Acts, disability benefit acts, or other employer benefit acts.

The obligations of the Grantee under this indemnification agreement shall not extend to the liability of the State of Michigan, its agents or employees arising out of (1) the preparation or approval of maps, drawings, opinions, reports, surveys, change orders, designs or specifications, or (2) the giving of or the failure to give directions or instructions by the State of Michigan, its agents or employees, provided such giving or failure to give is the primary cause of the injury or damage.

#### **IV-I GRANTEE'S LIABILITY INSURANCE**

The Grantee, as a condition of the Grant Agreement that may ensue from their PROPOSAL, shall purchase and maintain such insurance as will protect the Grantee from claims set forth below which may arise out of or result from the Grantee's operations under the Grant Agreement, whether such operations be by the Grantee or by any sub-grantee, or by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable.

1. Claims under Worker's Disability Compensation, disability benefit, and other similar employee benefit act. A nonresident Grantee shall have insurance for benefits payable under Michigan's Workers' Disability Compensation law for any employee resident of and hired in Michigan; and respects any other employee protected by Workers' Disability Compensation laws of any other state, the Grantee shall have insurance or participate in a mandatory state fund to cover the benefits payable to any such employee.
2. Claims for damages because of bodily injury, occupational sickness or disease, or death of his/her employees.
3. Claims for damages because of bodily injury, sickness or disease, or death of any person other than his/her employees, subject to limits of liability of not less than \$300,000 each occurrence and when applicable, \$300,000 annual aggregate, for non-automobile hazards and as required by law for automobile hazards.
4. Claims for damages because of injury to or destruction of tangible property, including loss of use resulting there from, subject to a limit of liability of not less than \$50,000 each occurrence for non-automobile hazards and as required by law for automobile hazards.
5. Insurance for subparagraphs (3) and (4) non-automobile hazards on a combined single limit of liability basis shall not be less than \$300,000 each occurrence and when applicable, \$300,000 annual aggregate.

The insurance shall be written for not less than any limits of liability herein specified or required by law, whichever is greater, and shall include contractual liability insurance as applicable to the Grantee's obligations under the indemnification clause of the Grant Agreement.

#### **IV-J NON-DISCRIMINATION AND OTHER COMPLIANCE WITH LAW**

Each proposal must include an assurance statement of compliance with all Federal and Michigan laws and regulations prohibiting discrimination and with all requirements and regulations of the MDE and the U.S. Department of Education (USED). The assurance must state that it is the policy of the bidder's organization that no person on the basis of race, color, religion, national origin, or ancestry, age, sex, marital status, or disability shall be discriminated against, excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination in any program or activity

for which the bidder is responsible or for which the bidder receives funding from the USED or the MDE.

#### **IV-K AMERICANS WITH DISABILITIES ACT**

The MDE is committed to providing equal access to all persons in admission to or operation of its programs and services. Individuals with disabilities needing accommodations for effective participation in this Grant program are invited to contact the MDE for assistance.

#### **IV-L EQUITABLE ACCESS**

All Mandated Activities Project Development and Implementation activities must promote equitable access to support meaningful implementation of the project and to ensure continuity and adherence to stated OEII goals and objectives.

#### **IV-M ACCEPTANCE OF PROPOSAL CONTENT**

The contents of the proposal of the successful bidder may become contractual obligations if a Grant Agreement ensues. Failure of the successful bidder to accept these obligations may result in cancellation of the Award.

#### **IV-N CONTINUATION OF FUNDING**

Continuation funding for this Grant project is subject to the availability of funds and the performance of the Grant. The MDE, OEII can cancel the Grant with 30 days written notice for:

- Default of the Contractor.
- In the event the OEII no longer needs the services or product specified in the Contract, or in the event program changes, changes in laws, rules or regulations, or the OEII determines that statewide implementation of the Contract is not feasible.
- Reduction in or elimination of funding allocations to the MDE under the ESEA, or any sub-part of the ESEA.
- Fiscal constraints that may occur as a result of compliance and improvement priorities.

#### **IV-O ASSURANCE OF GRANT CONDITIONS**

The submission of a proposal, signed by an official authorized to bind the agency submitting the proposal contractually, shall constitute assurance that the proposing agency has accepted, unconditionally and without reservation, all conditions, requirements, and specifications of the RFP. In addition, such submission shall constitute assurance that the submitting agency understands that all or any part of their proposal may be included by reference in any Grant Agreement based on the RFP. See Appendix A.

## Appendix A

<b>Applicant Agency</b> (Name and Address)	<b>Project Director</b> (Name, Title, Address, Phone)
<b>Implementing Agencies</b> (Name and Address)	<b>Authorized Negotiator</b> (Name, Title, Address, Phone)
<b>Project Title and Summary</b>	

### Authorizing Official Signature

The undersigned, having become thoroughly familiar with an understanding of all the proposed documents attached hereto, agrees to provide the services as specified herein, for the total fees as stipulated herein, subject to negotiation.

I hereby state that all of the information I have provided is true, accurate, and complete. I hereby state that I have authority to submit this proposal, which will become a binding agreement if accepted by the MDE. I hereby state that I have not communicated with, nor accepted anything of value from an employee of the OEII that would tend to destroy or hinder free competition.

I hereby state that I have read, understand, and agree to be bound by all the terms of Section III of this document.

Application is hereby made for a MDE grant in the amount and for the purposes set forth in this proposal.

\_\_\_\_\_  
Signature of Authorized Official

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**Title I MI Excel Statewide System of Support  
Technical Assistance Grant**

**RUBRIC**

Following is a rubric to help proposal writers discern whether they have sufficiently addressed all the required elements and to help reviewers score the proposals. It is strongly suggested the narrative be written in the sequence of the rubric.

**A. Work Plan**

Provide a clear description of the Fiscal Agent responsibilities to be carried out, including a plan for communicating to the MDE and participating organizations/sub grantees.

This section is worth a maximum of **40 points**.

<b>Marginally comprehensive, lacks rigor</b>	<b>Comprehensive, rigorous</b>	<b>Exceptionally comprehensive and rigorous</b>
A vague description of project accounting policies, procedures, and methods is provided OR project accounting is not addressed.	A general description of the project accounting policies, procedures, and methods is provided.	A comprehensive and well developed description of project accounting policies, procedures, and methods is provided.
A minimal description of how the Grantee will communicate with and report to the MDE and participating organizations/sub-grantees is provided OR communication and reporting is not addressed.	A general description of how the Grantee will communicate with and report to the MDE and participating organizations/sub-grantees is provided.	A comprehensive and well developed description of how the grantee will communicate with and report to the MDE and participating organizations/sub-grantees is provided. Appropriate timelines are included in the response.
Minimal description of disbursing policy, procedure, and methods is provided OR disbursing funds is not addressed.	A general description of disbursing policy, procedure, and methods is provided.	A comprehensive and well developed description of disbursing policy, procedure, and methods is provided. A description of the alignment between disbursements and project accounting is provided.

A minimal description of inventory policy, procedure, and methods is provided for assets acquired through this Grant OR inventory is not addressed.	A general description of inventory policy, procedure, and methods is provided for assets acquired through this Grant.	A comprehensive and well developed description of inventory policy, procedure, and methods is provided for assets acquired through this Grant.
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**B. Prior Experience and Internal Controls**

Provide a description of the Applicant’s prior experience and the internal controls in existence that will be used to fulfill the fiduciary responsibilities of the agency.

This section of the proposal is worth **20 points**.

<b>Marginally comprehensive, lacks rigor</b>	<b>Comprehensive, rigorous</b>	<b>Exceptionally comprehensive and rigorous</b>
The proposal provides assurances with few specifics of the existing internal controls; timelines for payments of authorized expenses; and documentation requirements needed from OEII to ensure timely payments.	The proposal provides a general description of the existing internal controls; timelines for payments of authorized expenses; and documentation requirements needed from OEII to ensure timely payments.	A comprehensive and well developed description of the existing internal controls; identifies timelines for payments of authorized expenses; and documentation requirements needed from OEII to ensure timely payments.
The proposal provides general descriptions of the agency’s most recent experience with state and federal programs, audit or monitoring results, and findings verifying appropriate internal controls are in place.	The proposal describes the agency’s most recent 3-year experience with state and federal programs, audit and monitoring results, and findings verifying appropriate internal controls are in place.	The proposal provides evidence of the agency’s most recent 3-year experience with state and federal programs, audit and monitoring results, and findings verifying appropriate internal controls are in place.

**C. Organization Capacity and Human Resources**

Provide a proposal for key personnel who will implement this Grant. A review of each application will be made to determine whether the qualifications of key personnel are appropriate. Describe key personnel in the Grantee’s organization that will provide fiscal oversight.

This section of the proposal is worth a maximum of **20 points**.

<b>Marginally comprehensive, lacks rigor</b>	<b>Comprehensive, rigorous</b>	<b>Exceptionally comprehensive and rigorous</b>
The proposal provides marginal evidence of the qualifications and experiences for key personnel to ensure completion of Fiscal Agent responsibilities.	The proposal provides evidence that the key personnel are qualified to carry out the fiscal responsibilities of the project and demonstrates an awareness of the need for dedicated time to Fiscal Agent responsibilities.	The proposal provides ample evidence of the qualifications of the key personnel to carry out the fiscal responsibilities of the project and provides the percentage of time each person will commit to these duties. Key personnel will be experienced in state and/or federal grant/ program administration, and compliance, technical assistance, and monitoring.

**D. Project Budget**

Provide a detailed project budget that includes salaries and/or stipends for all participants to be funded with the grant funds and a detailed description of other resources required for project completion, including flow-through dollars for the SSoS programs and initiatives. The application budget should include all activities and services grouped by salaries, benefits, purchased services, supplies and materials, capital outlay, and other expenditures, using appropriate function codes from the appendix to the Michigan Public School Accounting Manual.

This section of the proposal is worth a maximum of **20 points**.

<b>Marginally comprehensive, lacks rigor</b>	<b>Comprehensive, rigorous</b>	<b>Exceptionally comprehensive and rigorous</b>
<p>The budget is limited in scope and does not provide a detailed plan of how grant funds will be expended.</p>	<p>The budget is cost effective, complete and provides information on salaries, and other expenses.</p> <p>The budget demonstrates realistic costs and an understanding of appropriate fiduciary responsibilities.</p>	<p>The budget is cost effective to support the project and shows a clear and detailed relationship between budget items and project objectives.</p> <p>The budget demonstrates realistic costs and an understanding of appropriate fiduciary responsibilities.</p> <p>The budget clearly identifies indirect and administrative expenses.</p>

**Title I MI Excel Statewide System of Support  
Technical Assistance Grant**

<b>Budget Category</b>	<b>Budget Detail</b>	<b>Estimated Budget Amount</b>
<b>Project's Estimated Costs:</b>		
SSoS Programs:		
School Improvement Process Mentor/School Support Teams		\$250,000
School Improvement reviews for schools in their first year of identification and Data Workshops		\$150,000
Curriculum Surveys		\$50,000
Leadership Coach/Instructional Leadership Training		\$4,500,000
Coaching 101		\$1,700,000
Contracted School Improvement Staff		\$365,000
School Improvement Online Planning Tool		\$1,500,000
School Improvement Online Management Tool (Case Mgmt Tool)		\$250,000
Purchased Services:		
Contracted Services		
Travel & Lodging		
Conferences/Meetings/Trainings		
<b>Current Estimated Project Costs:</b>		
<b>Fiscal Agent's Estimated Costs:</b>		
Personnel & Benefits (Bidder should list grant personnel and full time employees)		
Supplies, Materials		
Other Expenses (explain)		
<b>Sub-Total:</b>		
<b>Below the line costs:</b>		
Indirect Costs (up to 8%)		
Audit		
Capital Outlay (Equipment purchases over \$500)		
<b>Grand Total (Not to exceed \$10,000,000)</b>		
In-kind Contribution		

**Title I MI Excel Statewide System of Support  
 Technical Assistance Grant  
 Review Panel  
 Individual Score Sheet**

<b>Work Plan 40 Points Maximum</b>		
<b>Description</b>	<b>Independent Rating</b>	<b>Score</b>
The proposal describes project accounting policies, procedures, and methods to be used by the Grantee as Fiscal Agent for the SSoS	0 5 10	
The proposal describes how the Grantee will communicate with and report to the MDE and participating organizations/sub-grantees, including appropriate timelines for that communication.	0 5 10	
The proposal describes disbursing policy, procedure, and methods to be used by the Grantee as the Fiscal Agent for the SSoS, including the alignment between disbursements and project accounting.	0 5 10	
The proposal describes inventory policy, procedure, and methods for assets acquired through this Grant.	0 5 10	
<b>Comments:</b>		
<b>Section Total: _____</b>		

<b>Prior Experience and Internal Controls 20 Points Maximum</b>		
<b>Description</b>	<b>Independent Rating</b>	<b>Score</b>
The proposal describes the existing internal controls, identifies timelines for payments of authorized expenses, and documentation requirements needed from the MDE to ensure timely payments.	0 5 10	
The proposal describes the agency's most recent 3-year experience with state and federal programs, audit and monitoring results and findings verifying appropriate internal controls are in place.	0 5 10	
<b>Comments</b>		
<b>Section Total: _____</b>		

<b>Organization Capacity and Human Resources 20 Points Maximum</b>		
<b>Description</b>	<b>Independent Rating</b>	<b>Score</b>
The proposal describes the qualifications of the key personnel to carry out the fiscal responsibilities of the project and provides the percentage of time each person will commit to these duties.	0 5 10	
Key personnel experience with state and/or federal grant/program administration and compliance, technical assistance, and monitoring.	0 5 10	
<b>Comments</b>		
<b>Section Total: _____</b>		

<b>Project Budget 20 Points Maximum</b>		
<b>Description</b>	<b>Independent Rating</b>	<b>Score</b>
The budget is cost effective to support the project and shows a clear and detailed relationship between budget items and project objectives.	0 5 10	
The budget demonstrates realistic costs and an understanding of appropriate fiduciary responsibilities.	0 3 5	
The budget clearly identifies indirect and administrative expenses.	0 3 5	
<b>Comments</b>		
<b>Section Total: _____</b>		

<b>Application Total</b>		
<b>Section</b>	<b>Maximum</b>	<b>Score</b>
Work Plan	40	
Prior Experience and Internal Controls	20	
Qualifications of Key Personnel	20	
Project Budget	20	
<b>Comments</b>		
<b>Application Total: _____</b>		
<b>100</b>		