



**Office of Education Improvement and Innovation
Title I MI Excel Statewide System of Support Technical
Assistance Grant**

Request for Proposal

ANNOUNCED: October 2, 2014

BY: Michigan Department of Education
Office of Education Improvement and
Innovation

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(517) 241-4715

**PROPOSAL PREPARATION,
FONT SIZE, AND PACKAGING:** Simply, economically prepared, double-spaced, one-
inch margins, with font no smaller than 11 Verdana.
No longer than 50 pages, including any appendices.

PROPOSALS DUE: October 21, 2014, at 5:00 p.m. EDST
(1 Original and 2 hard copies, plus 1 electronic copy;
plus 7 redacted hard copies, and 1 electronic
redacted copy)

AT: Michigan Department of Education
Office of Education Improvement and
Innovation
c/o Greg Olszta, Consultant
4th Floor, John Hannah Building
P.O. Box 30008
Lansing, MI 48909

REQUEST FOR PROPOSAL ANNOUNCEMENT

Title I MI Excel Statewide System of Support Technical Assistance Grant

The Michigan Department of Education (MDE) is requesting proposals from Michigan Local Educational Agencies (LEAs), which may include an intermediate school district (ISD), regional educational service agency (RESA), or consortia of LEAs or ISDs/RESAs. Applicants must have the capacity to provide the required deliverables, and comply with all terms and conditions described in the RFP.

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

The following documents must be submitted:

- **Original document, 2 additional hard copies, and 1 electronic copy** (may be on disc or flash drive) of your proposal and accessory documents;
- **7 redacted hard copies** and one electronic copy of your proposal and accessory documents with all identifying information removed.
 - Special instructions for redacted copies are provided in section 2.4

Proposals must be manually signed on this MDE form in the space provided below

Clearly mark the original copy as "ORIGINAL" on the cover

Please mail all documentation to the address listed below:

Michigan Department of Education
Office of Education Improvement and Innovation
c/o Bill Witt, Supervisor
4th Floor, John Hannah Building
P.O. Box 30008
Lansing, MI 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
c/o Greg Olszta, Consultant
Pillar H-19
608 West Allegan Street
Lansing, Michigan 48933

COVER PAGE

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.

State the full name and address of the organization and, if applicable, the branch office or other subordinate element(s) that will perform or assist in performing the work proposed.

- If the applicant is a consortium, the primary applicant is the Applicant Agency. If a consortium is the successful applicant, subgrant award funds will be paid to the Applicant Agency. Use additional pages, if needed, to identify the other consortium member agencies and their contact information.

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 50 pages in length, including all attachments and/or appendices. All application pages must be securely stapled. Special bindings and binders, inserted separators and heavy paper or cardstock cannot be used. Applications submitted but not in accordance with application preparation instructions **will be returned without review.**

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REQUEST FOR PROPOSAL:

Title I MI Excel Statewide System of Support Technical Assistance Grant

1.0 PROPOSAL OVERVIEW

1.1 Scope of Services Sought

The Michigan Department of Education (MDE) Office of Education Improvement and Innovation (OEII) is requesting proposals from Michigan Local Educational Agencies (LEAs), which may include an intermediate school district (ISD), regional educational service agency (RESA), or consortia of ISDs/RESAs. Applicants must have the capacity to provide the required deliverables, and comply with all terms and conditions described in the RFP.

Fiduciary responsibilities for the MI Excel SSoS include a demonstrated capacity for:

- Fiscal management of programming, subgrants, and contracts associated with the Michigan MI Excel SSoS.
- Implementation of program components including, but not limited to: audits, contracts, knowledge and experience in implementation of components of Michigan's MI Excel SSoS.
- Communications coordination.
- Implementation of events/meeting support.

The purpose of the grant is procurement of vendor services for fiduciary responsibilities.

The MI Excel SSoS provides:

- Technical assistance to Title I Priority and Focus Schools
- Cohesive activities with other state and federal initiatives
- Alignment of resources with best practice

1.2 Program Goal/Objectives

The MDE/OEII is seeking a subgrantee to serve as a Fiscal Agent for activities and services related to the MI Excel SSoS, and through subgrants, will coordinate funding of services and activities through the subgrant contact at the OEII. Such programs, training, technical assistance, and other activities will support continuous improvement in Title I schools identified as Priority and Focus under the ESEA and MDE's Flexibility Waiver.

In order to support the development and implementation of the MI Excel 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 Support Teams; typical costs go to support the implementation and management of these teams by a participating organization (historically an ISD or RESA)
- Initiatives to support African-American Young Men of Promise (AAYMPI)
- Introduction to Coaching Training (Coaching 101)
- An online school improvement planning tool
- An online school improvement management tool
- Training and professional development in school and district implementation of a Multi-Tiered Systems of Support (MTSS)
- Implementation of technical assistance and professional development, including but not limited to Surveys of Enacted Curriculum, Turnaround Leaders/MI Teacher Corps and other initiatives.

Such services and activities will be supported through this subgrant on an as needed basis. The subgrantee will provide fiscal management for these services and activities as coordinated through the grant contact at the OEII.

OBJECTIVES

The subgrantee 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 MI Excel SSoS. The subgrantee, as Fiscal Agent, will coordinate funding of services and activities through the subgrant contact at the OEII. The primary objective of this subgrant is to implement fiscal support for selected services and activities related to the MI Excel SSoS initiative as identified by the OEII.

1.3 Grant Award

This subgrant award will be 100% federally funded as a part of the Title I Technical Assistance Grant from the US Department of Education to the Michigan Department of Education. The proposal will be awarded with ESEA mandated activities funds; the anticipated total amount of this subgrant is up to **\$5,966,789** for nine (9) months in the first year, and approximately \$9,000,000 per year thereafter. The award is subject to change based on OEII need and availability of federal funds. Funding will be effective following the approval of the Grant Award by the Superintendent of Public Instruction. The funding period is nine months in the first year beginning January 1, 2015, and ending September 30, 2015, and in one-year (twelve month) increments thereafter. Based on need, the subgrantee's satisfactory performance and availability of funds, the project and yearly funding may continue for up to five years (a total of 57 months).

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

1.4 Definitions

State:	State of Michigan
ISD:	Intermediate School District
ESA:	Educational Services Agency
RESA:	Regional Educational Services Agency
MDE:	Michigan Department of Education
OEII:	Office of Education Improvement and Innovation
SRO:	School Reform Office
RESA:	Regional Educational Service Agency
IS:	Intervention Specialist
DIF	District Improvement Facilitator
SSoS:	Statewide System of Support for Title I Priority and Focus Schools
Applicant:	LEA, ISD/ESA/RESA, or consortium thereof submitting a subgrant application
Grantee	MDE is the Grantee and recipient of the Title I grant award from the United States Department of Education
RFP:	Request for Proposal
Subgrantee:	Successful applicant awarded the subgrant, as well as other organizations provided subsequent subgrant awards by the Fiscal Agent
LEA:	Local Education Agency
EDST:	Eastern Daylight Savings Time

1.5 Statutory Authorization

The Elementary and Secondary Education Act of 1965, as amended, Title I, Part A, Section 1003(a) authorizes the State of Michigan to grant funds to Local Education Agencies (LEA) for the purpose of turning around the lowest performing schools.

MDE's Theory of Action (from the ESEA Waiver Amendment approved July 24, 2013):

The successful applicant must adhere to and actively seek to effectively implement MDE's Theory of Action, as articulated in the approved ESEA Flexibility Waiver, which states: *If a school's challenges are accurately diagnosed through data analysis and professional dialogue at the building and district levels, then the implementation of a focused and customized set of interventions will result in school and student success. This approach will result in:*

- *Consistent implementation of career-and college-ready standards*
- *Rapid turnaround for schools not meeting annual measurable objectives (AMOs)*
- *Reduction in the achievement gap*
- *Reduction in systemic issues at the district level*
- *Improvements to the instructional core*
- *Better understanding/utilization of data*

- *Improved graduation and attendance rates*
- *Building of/support for effective teaching*
- *Building of/support for leadership capacity*
- *Effective accomplishment of responsibilities by district leadership*

1.6 Eligible Applicants

The Michigan Department of Education (MDE) is requesting proposals from Michigan Local Educational Agencies (LEAs), which may include an intermediate school district (ISD), regional educational service agency (RESA), or consortia of LEAs, or ISDs/RESAs. Applicants must have the capacity to provide the required deliverables, and comply with all terms and conditions described in the RFP.

1.7 Qualifications and Experience

The applicant must document in the application clear and convincing evidence of meeting the following conditions:

- A. The organization must show the ability to perform as a Fiscal Agent. Proposals must include documentation of the following:
 1. History of sound fiscal oversight for five (5) years or more
 2. Documented audit integrity for five (5) years or more
 3. Documented ability to support fiscal components within timelines, which may include copies of process flowcharts that may assist with demonstrating fiscal accountability for five (5) years or more
 4. Documented experience in managing fiscal support for multiple initiatives simultaneously over a period of three (3) or more years
 5. Documented procedures and protocols for fiscal processes
 6. 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.
 7. The applicant demonstrates the organizational and fiscal capacity to implement the project as described above, including a description of:
 - a. its current organization budget
 - b. current contracts and grant awards
 - c. other sources of revenue
 - d. specific federal grants managed.

1.8 Program Quality Assurance

The application must provide assurance of compliance to all identified deliverables.

- A. The applicant demonstrates its capacity to meet the needs of MDE, including independent financial audits in the past five year period:
 1. without substantial Financial Statement Findings
 2. without substantial Federal Award Findings and Questioned Costs, and
 3. which demonstrate adequacy of Internal Controls.

2.0 APPLICANT INSTRUCTIONS

2.1 RFP Inquiries

All inquiries concerning this RFP, including, but not limited to, requests for clarification and questions **shall be emailed with the subject line reading “Title I MI Excel Statewide System of Support Technical Assistance Grant”** citing the RFP title, Page, Section, and Paragraph, and submitted to the following Point of Contact:

Michigan Department of Education
Office of Education Improvement and Innovation
Greg Olszta, Consultant
OlsztaG@michigan.gov

Subject: **“Title I MI Excel Statewide System of Support Technical Assistance Grant”**

Applicants may submit questions via email only; however, MDE assumes no liability for assuring accurate/complete email transmission/receipt and is not responsible to acknowledge receipt.

Inquiries must be received by MDE’s Point of Contact (see above) no later than the conclusion of the Applicant Inquiry period (see 2.3 Calendar of Events). Inquiries received later than the conclusion of the Applicant Inquiry Period shall not be considered properly submitted and will not be considered.

MDE intends to issue official responses to properly submitted inquiries on or before the date specified in the Calendar of Events; however, this date may be subject to change at MDE’s discretion. MDE may also consolidate and/or paraphrase questions for sufficiency and clarity. MDE may, at its discretion, amend this RFP on its own initiative or in response to issues raised by inquiries, as it deems appropriate. Oral statements, representations, clarifications, or modifications concerning the RFP shall not be binding upon MDE. MDE will make publicly available all inquiries and responses, upon request.

In the event that it becomes necessary for the MDE/OEII to revise any Grant Deliverables in Section 3.0, or revision to any other portion of the RFP, an addendum will be posted on the MDE/OEII web page.

2.2 How to Respond

The cover page of this RFP document contains specific instructions as to where and to whom your response should be addressed; the number of copies needed, and due date and cut-off time, along with other important instructions.

To be considered, proposals must arrive at the MDE 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**.

2.3 Calendar of Events

The following table provides the Calendar of Events for this RFP:

<u>EVENT</u>	<u>DATE</u>	<u>TIME</u>
RFP announcement	October 2, 2014	
Applicant inquiry begins	October 2, 2014	8:00 a.m. (EDST)
Applicant Inquiry period ends	October 21, 2014	12:00 p.m. (EDST)
Final date for Application submission	October 21, 2014	5:00 p.m. (EDST)
Anticipated Award	November 14, 2014	

2.4 Special Instructions for Redacted Proposals

In an effort to have applications remain anonymous for scoring, the following guidance is provided when constructing a **redacted proposal**:

- A. All identifying information must be removed from the body of the proposal and supporting documents (including vitae).
 1. Do not use proper names of staff or service providers; use a position title such as reading consultant, manager, assistant superintendent, or contracted professional development provider.
 2. Do not use the ISD or LEA district code anywhere in the proposal.
 3. Do not use district, school, organization or partner names (other than the MDE) or locations that could identify the applicant.
 4. Contact information must be omitted.

- B. All identifying information must be removed from the budget pages and accompanying information.
 1. Do not use the district code, partner, or organization contact information.
 2. Do not use district, school, or organization names or locations that could identify the applicant.
 3. Do not use the proper names of staff or service providers; use a position title such as superintendent, project manager, reading consultant or contract professional development provider.

3.0 RFP DELIVERABLES

Implementation of the Fiscal Agent Role as subgrantee for the Title I MI Excel Statewide System of Support Technical Assistance Grant

The applicant must provide a detailed narrative describing how it proposes to implement the following deliverables. The narrative must include detailed examples of its past work, which documents financial accountability and success. The **applicant's narrative** is to follow the numerical sequence of the RFP deliverables described in the RFP below.

3.1 Understanding of Need

The OEII is seeking a subgrantee to serve as a Fiscal Agent for activities and services related to the MI Excel SSoS, and to implement training, technical assistance, and other activities to support continuous improvement in Title I schools identified as Priority and Focus schools and their districts under the ESEA and the Flexibility Waiver.

In order to support the development and implementation of the MI Excel 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 but are not limited to:

- School Support Teams; typical costs go to support the implementation and management of these teams by a participating organization (historically an ISD or RESA)
- Initiatives to support African-American Young Men of Promise (AAYMPI)
- Introduction to Coaching Training (Coaching 101)
- An online school improvement planning tool
- An online school improvement management tool
- Training and professional development in school and district implementation of a Multi-Tiered Systems of Support (MTSS)
- Implementation of technical assistance and professional development, including but not limited to Surveys of Enacted Curriculum, Turnaround Leaders/MI Teacher Corps and other initiatives.

Such services and activities will be supported through this subgrant on an as needed basis. The subgrantee will provide fiscal management for these services and activities as coordinated through the grant contact at the OEII.

The **narrative** must propose how the applicant would implement the above as Fiscal Agent for the MDE.

3.2 Objectives

The subgrantee 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 MI Excel SSoS. The subgrantee, as Fiscal Agent, will coordinate funding of services and activities through the subgrant contact at the OEII. The primary objective of this Grant is to implement fiscal support for selected services and activities related to the MI Excel SSoS initiative as identified by the OEII.

The **narrative** must propose how the applicant would implement the above as Fiscal Agent for the MDE.

3.3 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/subgrantee projects funded through this subgrant. The Fiscal Agent should establish a separate project account for each grant project. All project receipts and disbursements should be recorded in this account.

A. 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. In accordance with the underlying principle of this subgrant, 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.

B. Documentation Required of the Fiscal Agent

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 contracted vendor organizations and subgrantees, only after receipt of a detailed report of expenditures by the participating organizations/subgrantees. 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 subgrant. 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 will periodically ask for such documentation to verify compliance.

C. 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 Subgrant Agreement or Contract. When grant assets are located at a participating organization(s), this location should be identified on the Fiscal Agent's inventory records, obtained from the subgrantee.

Verification of assets according to the Fiscal Agent's periodic inventory procedures should include those assets acquired as Fiscal Agents.

The Fiscal Agent will also monitor to assure that subgrantees maintain a fixed asset inventory and that the subgrantee provide a copy of the fixed asset inventory to the Fiscal Agent, updated on at least an annual basis.

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.

D. RFP Dissemination and Review of Proposals Received

The Fiscal Agent will collaborate with the MDE to disseminate competitive RFPs as may be required, to solicit, evaluate and make recommendations for subgrants, contracts and awards to MI Excel SSoS partners. Such RFPs will be prepared by the Fiscal Agent, in conjunction with the MDE, and the Fiscal Agent will announce and disseminate the RFPs, receive applications, evaluate proposals and make recommendations for the subgrant or contract award. At the direction of the MDE, the Fiscal Agent will issue a contract or subgrant award to the successful applicant organization.

The **narrative** must propose how the applicant would implement the above as Fiscal Agent for the MDE.

3.4 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, including:

- A. 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.
- B. The proposal provides evidence of the agency's most recent 5-year experience with state and federal programs, audit and monitoring results, and findings verifying appropriate internal controls are in place.

3.5 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 MI Excel partner organizations/subgrantees, including:

- A. A comprehensive and well developed description of project accounting policies, procedures, and methods is provided.
- B. A comprehensive and well developed description of how the Subgrantee will communicate with and report to the MDE and participating organizations/subgrantees is provided. Appropriate timelines are included in

the response.

- C. 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.
- D. A comprehensive and well developed description of inventory policy, procedure, and methods is provided for assets acquired through this Grant.
- E. A comprehensive and well developed description of required accountability and adherence to the Education Department General Administrative Regulations (EDGAR), Parts 76 and 80, Office of Management and Budget Circular A-133, A-110, and other applicable Grants Management Circulars and audit requirements.
- F. A comprehensive and well developed description of a plan for monitoring and audit of subgrantees and vendors that ensures their adherence to Scope of Work, contracts, and applicable federal and state requirements for subgrantees and vendors receiving Title I funds. Describe how the Fiscal Agent will ensure subgrantees and vendors are not excluded or debarred from receipt of federal funds.

3.6 Reporting

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

- A. detailed **annual** report of:
 - 1. Total program activities and expenditures
 - 2. Activities and expenditures by participating organization/subgrantee
- B. **monthly** updates on:
 - 1. Total program activities and expenditures
 - 2. Activities and expenditures by participating organization/subgrantee

The Fiscal Agent must ensure that participating organizations/subgrantees 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.

The Fiscal Agent must attend team meetings and provide updates on grant activities and deliverables to the fiscal agent, the MDE and other MI Excel SSoS partners, as directed by the MDE/OEII.

The **narrative** must propose how the applicant would implement the above as Fiscal Agent for the MDE.

4.0 PROPOSAL EVALUATION

4.1 Proposal Checklist

The proposal must include the following (original and redacted versions, except where noted):

- A. The applicant must document in the application clear and convincing ability to perform as a Fiscal Agent. Proposals must include documentation of the following:
 1. History of sound fiscal oversight for five (5) years or more
 2. Documented audit integrity for five (5) years or more
 3. Documented ability to support fiscal components within timelines, which may include copies of process flowcharts that may assist with demonstrating fiscal accountability for five (5) years or more
 4. Documented experience in managing fiscal support for multiple initiatives simultaneously over a period of three (3) or more years
 5. Documented procedures and protocols for fiscal processes
 6. 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.
 7. The applicant demonstrates the organizational and fiscal capacity to implement the project as described above, including a description of:
 - a. its current organization budget
 - b. current contracts and grant awards
 - c. other sources of revenue
 - d. specific federal grants managed.
- B. A detailed narrative for each of the grant deliverables describing how they will be accomplished.
- C. A management, staffing, and budget plan for the internal management of the grant work that will ensure accomplishment of the deliverables.
- D. An organization chart indicating staff (by name; however, do not include names or identifying information in redacted versions), task responsibilities, and timeline.

4.2 Selection Criteria

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 using all relevant information provided in the proposal using a level of competence (superior, good, average, limited, poor) in the following areas:

- A. Applicant Qualifications and Experience Narrative #1
- B. Implementation of the Fiscal Agent Role as subgrantee for the Title I MI Excel Statewide System of Support Technical Assistance Grant
 1. RFP Deliverable 3.1 Narrative #2
 2. RFP Deliverable 3.2 Narrative #3

3. RFP Deliverable 3.3 Narrative #4
 4. RFP Deliverable 3.4 Narrative #5
 5. RFP Deliverable 3.5 Narrative #6
 6. RFP Deliverable 3.6 Narrative #7
 7. Management, Staffing Organizational Chart, Narrative #8
 8. Budget Plan, Narrative #9
- C. Staffing and Budget
1. Management, Staffing, and Organizational Chart (original and redacted versions; however, do **not** include names or identifying information in redacted versions).
 - a. Provide a proposal for key personnel who will implement this subgrant. A review of each application will be made to determine whether the qualifications of key personnel are appropriate. Describe key personnel in the subgrantee's organization that will provide fiscal oversight.
 - i. The proposal must provide 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.
 2. Budget Plan (original and redacted versions; however, do **not** include names or identifying information in redacted versions):
 - a. Provide a detailed project budget, one that covers a partial year (nine months of implementation January 1, 2015, through September 30, 2015).
 - b. The applicant's budget for nine month implementation (January 1, 2015, through September 30, 2015) may not exceed \$5,966,789.
 - c. Include salaries and/or stipends for all participants to be funded with the grant funds and a detailed description of all other resources required for project completion. 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 Expenditure Function Codes (pages 24-32) from the Appendix-Definitions of Account Codes, to the Michigan Public School Accounting Manual:
http://www.michigan.gov/documents/appendix_33974_7.pdf.
 - d. The Budget Detail should be expanded to accommodate the level of detail required to assess its breadth and completeness, and whether costs are reasonable.

A partial budget and minimal budget details are provided below. 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 up to \$5,966,789 for nine months will be utilized in the first year of the project. The amount will be approximately \$9,000,000 for each year thereafter, dependent upon availability of federal funds. Budget amounts will be negotiated in collaboration with the MDE.

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

- Approximately \$450,000 for School Support Teams and IS and DIF professional development
- Approximately \$187,500 for implementation of Professional Development on Multi-Tiered Systems of Supports
- Approximately \$195,000 for contracted MI Excel evaluation and focus group feedback
- Approximately \$358,800 for African American Young Men of Promise Initiatives (AAYMPI)
- Approximately \$476,250 for contracted School Improvement Consultants
- \$1,222,500 for Online Planning and Management Tools
- \$150,000 Instructional Coaching Modules
- \$11,250 MDE Implemented Professional Development and Technical Assistance Meetings
- \$750,000 to implement Coaching 101 Grant
- \$50,000 for School Improvement Review stipends for reviewers
- \$41,250 for University of Wisconsin training on Surveys of Enacted Curriculum
- \$3,750 Technical Assistance on Surveys of Enacted Curriculum
- \$375,000 Contracted School Improvement Grant (SIG) Monitors
- \$1,125,000 Turnaround Leaders/MI Teacher Corps

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.

Budget Category	Budget Detail	Estimated Budget Amount
Project's Estimated Costs:		
MI Excel SSoS Programs: <ul style="list-style-type: none"> - School Support Teams/IS and DIF professional development -Professional Development on Multi-Tiered Systems of Supports -MI Excel evaluation and focus group feedback -African American Young Men of Promise Initiatives (AAYMPI) -Contracted School Improvement Consultants (not subject to \$25,000 indirect rule; see note on next page) -Online Planning and Management Tools -Instructional Coaching Modules -MDE Implemented Professional Development and Technical Assistance Meetings -Coaching 101 Grant -School Improvement Review stipends for reviewers - University of Wisconsin training on Surveys of Enacted Curriculum -Technical Assistance on Surveys of Enacted Curriculum - Contracted School Improvement Grant (SIG) Monitors (not subject to \$25,000 indirect rule; see note on next page) - Turnaround Leaders/MI Teacher Corps Purchased Services: <ul style="list-style-type: none"> Contracted Services Travel & Lodging Conferences/Meetings/Trainings 		\$450,000 \$187,500 \$195,000 \$358,800 \$476,250 \$1,222,500 \$150,000 \$11,250 \$750,000 \$50,000 \$41,250 \$3,750 \$375,000 \$1,125,000
Current Estimated Project Costs:		\$5,396,300
Fiscal Agent's Estimated Costs:		
Personnel & Benefits (Bidder should list grant personnel and full time employees; these costs not subject to \$25,000 indirect rule -see note on next page) Supplies, Materials		\$375,000
Sub-Total:		
Below the line costs:		
Indirect Costs Indirect costs are calculated at the current federal indirect rate as approved by MDE. The number at right represents the highest restricted indirect rate (15%) allowed by MDE that may be charged against this grant. See note on Indirect Costs and the \$25,000 Rule Other Expenses (explain) Audit Capital Outlay (Equipment purchases over \$500)		\$195,489
Grand Total (Not to exceed \$5,966,789 for nine months)		
In-kind Contribution		

Applicants 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 subgrantee would be responsible.

Note on Indirect Costs and the \$25,000 Rule: All Michigan LEAs and charter schools have federally approved indirect cost rates calculated and published by the MDE on an annual basis. The federal government has determined that costs related to some contracted services are distorting in nature, and must be excluded in part from the calculation of indirect cost rates. The underlying rationale is that if an LEA chooses to contract with outside vendors to provide services within the LEA, those contracts have a tendency to reduce the administrative effort required by the LEA to complete that function. To be consistent, indirect rates may only be applied by the LEA to the first \$25,000 of any contract or subgrant related to a federal grant. This general principle applies to all costs that are excluded from the indirect cost rate calculation. If the cost is excluded from the rate calculation, the LEA may not apply an indirect rate to that cost. Most of the project costs in this proposal are subject to this rule. All projects that are not subject to the \$25,000 rule have been noted as such. All other projects not so noted are subject to this rule.

Overall RFP

- A. Overall RFP completeness, organization, detail, and the likelihood of the applicant's ability to meet the identified deliverables.

A total of **95 points** is possible; **however, a minimum of 76 points must be obtained for consideration of proposal.** Refer to Appendix A for complete Selection Criteria Rubric. The narrative should be written in the sequence of the rubric.

4.3 MDE Rights in Evaluating Proposal

MDE reserves the right to:

- Consider any source of information in evaluating proposals,
- Omit any planned evaluation step if, in MDE's view, the step is not needed,
- At its sole discretion, reject any and all proposals at any time,
- Open discussions with the second highest scoring applicant, if the MDE is unable to reach an agreement on award terms with the highest scoring applicant.
- Require oral presentations of the applicants' proposals to the MDE. These presentations may provide an opportunity for bidders to clarify the proposal to ensure thorough mutual understanding. The MDE/OEII will schedule these presentations, if required.

5.0 TERMS AND CONDITIONS

5.1 Alteration of Application

The original submitted application document is on file with MDE. Any alteration to this application or any file associated with the application is prohibited. Any such changes may result in a proposal being rejected.

5.2 Rejection of Proposal

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.

5.3 Incurring Costs

There is no express or implied obligation of MDE to reimburse any individual or firm for any costs incurred in preparing or submitting responses; for providing additional information when requested by MDE; or for participating in any applicant conference, technical assistance meeting, interview, or negotiation.

5.4 Confidentiality of Proposal

A proposal must remain confidential until the effective date of any resulting award as a result of this RFP. An applicant's disclosure or distribution of proposals, other than to the MDE, will be grounds for disqualification.

5.5 Applicant Conduct

During the application window (the date from release of the RFP to final award), applicants are not permitted to contact any MDE employee regarding the RFP unless written permission is given by the MDE subgrant contact identified within this document. No gratuities of any kind will be accepted, including meals, gifts, and trips, except as provided as a reference site visitation during finalist evaluations, if needed. Violation of these conditions will constitute immediate disqualification.

5.6 Applicant Responsibilities

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

5.7 Applicant Staff

MDE may conduct reference and background checks on the applicant, assigned workers, or subcontractors. MDE reserves the right to reject the Applicant, assigned workers, or subcontractor as a result of such reference and background checks.

5.8 Conflict of Interest

All applicants must disclose the name of any officer, director, or agent who is also employed by or represents MDE. All applicants must disclose the name of any employee or representative who owns, directly or indirectly, any interest in the applicant's business or any of its branches.

5.9 Lobbying for Grants and Cooperative Agreements

No federal, appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of a federal agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the making of any federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any federal grant or cooperative agreement. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL "Disclosure Form to Report Lobbying," in accordance with its instructions. The undersigned shall require that the language of this certification be included in the awards documents for all sub awards at all tiers (including subgrantees, contracts under grants and cooperative agreements, and subcontracts) and that all sub recipients shall certify and disclose accordingly.

5.10 Insurance

The subgrantee, as a condition of the Grant Agreement that may ensue from their proposal, shall purchase and maintain such insurance as will protect the subgrantee from claims set forth below which may arise out of or result from the subgrantee's operations under the Grant Agreement, whether such operations be by the

subgrantee or by any other subgrantee or vendor, or by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable.

The subgrantee must provide proof of the minimum levels of insurance coverage as indicated below. The insurance must protect the State from claims which may arise out of or result from the Subgrantee's performance of Services under the terms of the Contract, whether the Services are performed by the Subgrantee, or by any other subgrantee or contracted vendor, or by anyone directly or indirectly employed by any of them, or by anyone for whose acts they may be liable.

The subgrantee waives all rights against the State of Michigan, its departments, divisions, agencies, offices, commissions, officers, employees and agents for recovery of damages to the extent these damages are covered by the insurance policies the Subgrantee is required to maintain under the Contract.

All insurance coverage's provided relative to the Contract/Purchase Order are PRIMARY and NON-CONTRIBUTING to any comparable liability insurance (including self-insurances) carried by the State.

The insurance must be written for not less than any minimum coverage specified in the RFP or required by law, whichever is greater.

The insurers selected by subgrantee must have an A.M. Best rating of A or better. All policies of insurance required in the RFP must be issued by companies that have been approved to do business in the State. See www.michigan.gov/deleg. Insurance companies must be acceptable to MDE

Where specific limits are shown, they are the minimum acceptable limits. If subgrantee's policy contains higher limits, the State must be entitled to coverage to the extent of the higher limits.

The Subgrantee is required to pay for and provide the type and amount of insurance as indicated below:

A. Commercial General Liability with the following minimum coverage:

- \$1,000,000 General Aggregate Limit other than Products/Completed Operations
- \$1,000,000 Products/Completed Operations Aggregate Limit
- \$1,000,000 Personal & Advertising Injury Limit
- \$1,000,000 Each Occurrence Limit

The subgrantee must list the State of Michigan, Michigan Department of Education, its employees and agents as ADDITIONAL INSURED on the Commercial General Liability certificate. The subgrantee also agrees to

provide evidence that insurance policies contain a waiver of subrogation by the insurance company.

- B. Workers' compensation coverage must be provided according to applicable laws governing the employees and employers work activities in the state of the subgrantee's domicile. If the applicable coverage is provided by a self-insurer, proof must be provided of approved self-insured authority by the jurisdiction of domicile. For employees working outside of the state of qualification, subgrantee must provide appropriate certificates of insurance proving mandated coverage levels for the jurisdictions where the employees' activities occur.

The subgrantee also agrees to provide evidence that insurance policies contain a waiver of subrogation by the insurance company. This provision must not be applicable where prohibited or limited by the laws of the jurisdiction in which the work is to be performed.

Documentation of insurance, in the form of Certificates of Insurance, will be required to be submitted prior to the award of the contract. The certificate of insurance or policies of insurance, evidencing all coverage, must include a statement that the MDE will be afforded a thirty (30) day written notice of cancellation, non-renewal, or material change by any of the Applicant's insurers providing the coverage required by MDE for the duration of the contract. Documentation is not required at the time of the RFP response. In your proposal, indicate whether or not you will be able to obtain the required coverage and meet the specified terms and conditions.

5.11 Indemnification

The subgrantee, as a condition of the Grant Agreement that may ensue from the RFP, shall indemnify and hold harmless the State of Michigan, MDE, 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 subgrantee, and any other subgrantee or contracted vendor, 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, MDE, or any of its agents or employees by any employee of the subgrantee, any other subgrantee or contracted vendor, 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 subgrantee, or any other subgrantee or contracted vendor, under Workers Disability Compensation Acts, disability benefit acts, or other employer benefit acts.

The obligations of the subgrantee under this indemnification agreement shall not extend to the liability of the State of Michigan, MDE, 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, MDE, its agents or employees, provided such giving or failure to give is the primary cause of the injury or damage.

5.12 Tax Exempt

The MDE is exempt from sales and use tax by state statute.

5.13 Audit Requirements

The Applicant will maintain a separate accounting of expenditures for this Grant Award 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 subgrant. Generally acceptable accounting procedures will be used. The subgrantee's independent auditor will be made aware of the subgrant so that the auditor can review expenditures as required by federal single audit requirements. The auditor must review all contracts over \$25,000.

Expenses charged to this subgrant 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.

All subgrant recipients who receive \$500,000 or more in federal funds from all sources are required to have an audit performed in compliance with the Single Audit Act (effective January 2004). The subgrant recipient must also comply with required accountability and adherence to the Education Department General Administrative Regulations (EDGAR), Parts 76 and 80, and other applicable grant and audit requirements.

5.14 Audit of Pricing and Billing Procedures

The MDE reserves the right to conduct periodic audits of pricing and billing procedures, as well as other terms, conditions and procedures of the grant award between the subgrantee and MDE.

5.15 Access to Records and Financial Statements

The applicant hereby assures that it will provide the pass-through entity and auditors with access to the records and financial statements as necessary for the pass-through entity to comply with Section 400 (d) (4) of the U.S. Department of Education Compliance Supplement for A-133.

5.16 State and Federal Monitoring Visits

All contract and subgrant awards are subject to onsite review. Applicant staff must maintain and make available, in the event of a State and/or Federal monitoring visit, evidence to support the complete implementation of the proposed contract.

5.17 Cancellation

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 10 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, its Flexibility Waiver granted to the MDE, or any sub-part of the ESEA.
- Fiscal constraints that may occur as a result of compliance and improvement priorities.

In the event an subgrantee shall default in any of the covenants, agreements, commitments, or conditions and any such default shall continue unremedied for a period of ten (10) days after written notice to the subgrantee, the MDE may, at its option and in addition to other rights and remedies which it may have, terminate the agreement and all rights of the vendor under the agreement. Failure to maintain the required certificates of insurance, permits, licenses, and/or bonds will be cause for grant termination.

5.18 Joint Proposals

The MDE requires a single application for all RFP items. In the event a group of applicants elect to submit a single response, all participating applicants must be identified in the response, and a "primary applicant" must be assigned who will be responsible for negotiating all RFP matters. If the applicant is a consortium, the primary applicant is the Applicant Agency. If a consortium is the successful applicant, subgrant award funds will be paid to the applicant agency.

The MDE reserves the right to accept the primary applicant, but reject any secondary applicant. The primary applicant will have the option of withdrawing its

application, without penalty, or replacing the rejected subcontractor or consortia member.

5.19 Designation of Subcontractors

The applicant may employ subcontractors to deliver required services, subject to the terms and conditions of this RFP. The applicant shall remain wholly responsible for performance of the entire subgrant regardless of whether a subcontractor is used. MDE will consider the applicant to be the sole point of contact with regard to all subgrant and contractual matters, including payment of any and all charges resulting from the award.

5.20 Certification Regarding Nondiscrimination

The applicant hereby agrees that it will comply with all federal and Michigan laws and regulations prohibiting discrimination and, in accordance with requirements of the State of Michigan, MDE and the United States Department of Education (USED), 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 it is responsible or for which it receives financial assistance from the USED or the MDE.

5.21 Assurance Concerning Materials Developed and Assets Purchased

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.

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 subcontractors, subgrantees, or vendors 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.

5.22 Section 511 of the U.S.E.D. Appropriation Act of 1990

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.

When issuing statements, press releases, requests for proposals, solicitations, and other documents describing this project, the recipient shall state clearly: 1) the dollar amount of federal funds for the project, 2) the percentage of the total cost of the project that will be financed with federal funds, and 3) the percentage and dollar amount of the total cost of the project that will be financed by nongovernmental sources.

5.23 Contract Award

A grant award by the MDE will be based upon criteria, standards, and weighting identified in this RFP. Each applicant proposal will be considered as a whole solution, without limitation, including all services proposed, qualifications of the applicant and any subcontractor, and cost. The proposal will be awarded with ESEA mandated activities funds; the anticipated total amount of this grant is up to \$5,966,789. The award is subject to change based on MDE need. Funding will be effective following the approval of the Grant Award by The. The initial award for the implementation of the program and activities begins January 1, 2014, and ends September 30, 2015. Full year awards are in one-year increments thereafter. Based on satisfactory performance and availability of funds from the US Department of Education, and assessed needs of MI Excel Schools and districts as determined by the MDE, the project and annual full year funding may continue up to five years (for a total of up to 57 months).

5.24 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 Selection Criteria Rubric – Appendix A, 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 Superintendent of Public Instruction may apply other factors in making funding decisions such as the performance of the Fiscal Agent on previously funded initiatives.

5.25 Compliance with Grant Program Requirement

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.

The applicant agrees to comply with all applicable requirements of all State statutes, Federal laws, executive orders, regulations, policies and award conditions governing this program. The applicant understands and agrees that if it materially fails to comply with the terms and conditions of the grant award the MDE may withhold funds otherwise due to the Applicant from this grant program, any other federal grant programs or the State School Aid Act of 1979 as amended, until the Applicant comes into compliance or the matter has been adjudicated and the amount disallowed has been recaptured (forfeited). The MDE may withhold up to 100% of any payment based on a monitoring finding, audit finding, or pending final report.

5.26 Debarment and Suspension

The applicant assures that it is in compliance with the provisions of the *A-102 Common Rule* or *OMB Circular A-110*, and that the entity, its employees and sub-contractors, is not suspended or debarred, or otherwise excluded from or ineligible for receipt of federal funds. If the applicant is granted the award, it assures that any and all subgrant awards or sub-contracts include language requiring certification that a proposed contractor is not listed on the suspension disbarment or excluded parties lists.

5.27 Governing Law

The provisions of any award, resulting from this RFP, shall be constructed in accordance with the laws in the State of Michigan.

5.28 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.

5.29 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.

5.30 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.

5.31 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.

5.32 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.

Selection Criteria Rubric – Appendix A

The narratives should be written in the sequence of the rubric.

i. Qualifications and Experience (Narrative #1) 5 points Each, 25 points total this section	Superior	Good	Average	Limited	Poor
1. Narrative #1: Applicant Experience The applicant must document in the application clear and convincing evidence of meeting the following conditions: <input type="checkbox"/> The organization must show the ability to perform as a Fiscal Agent. <input type="checkbox"/> Proposals must include documentation of the following: <input type="radio"/> History of sound fiscal oversight for five (5) years or more <input type="radio"/> Documented audit integrity for five (5) years or more	5	4	3	2	1
Reviewer Comments:					
B. Narrative #1: Applicant Experience The applicant must document in the application clear and convincing evidence of meeting the following conditions: <input type="checkbox"/> Documented ability to support fiscal components within timelines, which may include copies of process flowcharts that may assist with demonstrating fiscal accountability for five (5) years or more <input type="checkbox"/> Documented experience in managing fiscal support for multiple initiatives simultaneously over a period of three (3) or more years.	5	4	3	2	1
Reviewer Comments:					
C. Narrative #1: Applicant Experience The applicant must document in the application clear and convincing evidence of meeting the following conditions: <input type="checkbox"/> Documented procedures and protocols for fiscal processes <input type="checkbox"/> 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.	5	4	3	2	1
Reviewer Comments:					

i. Qualifications and Experience (Narrative #1) - Continued 5 points Each, 25 points total this section	Superior	Good	Average	Limited	Poor
<p>4. Narrative #1: Applicant Experience The applicant must document in the application clear and convincing evidence of meeting the following conditions:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The applicant demonstrates the organizational and fiscal capacity to implement the project as described above, including a description of: <ul style="list-style-type: none"> <input type="radio"/> its current organization budget <input type="radio"/> current contracts and grant awards <input type="radio"/> other sources of revenue <input type="radio"/> specific federal grants managed. 	5	4	3	2	1
Reviewer Comments:					
<p>5. Narrative #1: Program Quality Assurance The application must provide assurance of compliance to all identified deliverables.</p> <ul style="list-style-type: none"> <input type="checkbox"/> The applicant demonstrates its capacity to meet the needs of MDE, including independent financial audits in the past five year period: <ul style="list-style-type: none"> <input type="radio"/> without significant Financial Statement Findings <input type="radio"/> without significant Federal Award Findings and Questioned Costs, <input type="radio"/> and which demonstrate adequacy of Internal Controls. 	5	4	3	2	1
Reviewer Comments:					
Total this section: (25 points possible)					

II. Implementation of the Fiscal Agent Role as Subgrantee for the Title I MI Excel Statewide System of Support Technical Assistance Grant 5 points Each, 50 points possible this section	Superior	Good	Average	Limited	Poor
<p>1. RFP Deliverable 3.1 Narrative #2: Understanding of Need</p> <p>The applicant must provide a detailed narrative describing how it proposes to implement the following deliverables. Deliverables include the development and implementation of the MI Excel SSoS, through 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 but are not limited to:</p> <ul style="list-style-type: none"> • School Support Teams; typical costs go to support the implementation and management of these teams by a participating organization (historically an ISD or RESA) • Initiatives to support African-American Young Men of Promise (AAYMPI) • Introduction to Coaching Training (Coaching 101) • An online school improvement planning tool • An online school improvement management tool • Training and professional development in school and district implementation of a Multi-Tiered Systems of Support (MTSS) • Implementation of technical assistance and professional development, including but not limited to Surveys of Enacted Curriculum, Turnaround Leaders/MI Teacher Corps and other initiatives. <p>Such services and activities will be supported through this subgrant on an as needed basis. The subgrantee will provide fiscal management for these services and activities as coordinated through the grant contact at the OEII.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>	5	4	3	2	1
Reviewer Comments:					

II. Implementation of the Fiscal Agent Role as Subgrantee for the Title I MI Excel Statewide System of Support Technical Assistance Grant - Continued 5 points Each, 50 points possible this section	Superior	Good	Average	Limited	Poor
<p>2. RFP Deliverable 3.2 Narrative #3: Objectives</p> <p>The subgrantee 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 MI Excel SSoS. The subgrantee, as Fiscal Agent, will coordinate funding of services and activities through the subgrant contact at the OEII. The primary objective of this Grant is to implement fiscal support for selected services and activities related to the MI Excel SSoS initiative as identified by the OEII.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>	5	4	3	2	1
Reviewer Comments:					
<p>3. RFP Deliverable 3.3 Narrative #4: Project Accounting</p> <p>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/subgrantee projects funded through this subgrant. The Fiscal Agent should establish a separate project account for each grant project. All project receipts and disbursements should be recorded in this account.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>	5	4	3	2	1
Reviewer Comments:					

II. Implementation of the Fiscal Agent Role as Subgrantee for the Title I MI Excel Statewide System of Support Technical Assistance Grant - Continued 5 points Each, 50 points possible this section	Superior	Good	Average	Limited	Poor
<p>3. RFP Deliverable 3.3 Narrative #4 (Continued):</p> <p>A. Disbursing Funds</p> <p>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. In accordance with the underlying principle of this subgrant, 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.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>	5	4	3	2	1
<p>Reviewer Comments:</p>					
<p>B. Documentation Required of the Fiscal Agent</p> <p>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 contracted vendor organizations and subgrantees, only after receipt of a detailed report of expenditures by the participating organizations/subgrantees. 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 subgrant. 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 will periodically ask for such documentation to verify compliance.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>	5	4	3	2	1
<p>Reviewer Comments:</p>					

II. Implementation of the Fiscal Agent Role as Subgrantee for the Title I MI Excel Statewide System of Support Technical Assistance Grant - Continued 5 points Each, 50 points possible this section	Superior	Good	Average	Limited	Poor
<p>3. RFP Deliverable 3.3 Narrative #4 (Continued):</p> <p>C. Inventory Records</p> <p>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 Subgrant Agreement or Contract. When grant assets are located at a participating organization(s), this location should be identified on the Fiscal Agent's inventory records, obtained from the subgrantee. Verification of assets according to the Fiscal Agent's periodic inventory procedures should include those assets acquired as Fiscal Agents.</p> <p>The Fiscal Agent will also monitor to assure that subgrantees maintain a fixed asset inventory and that the subgrantees provide a copy of the fixed asset inventory to the Fiscal Agent, updated on at least an annual basis.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>	5	4	3	2	1
Reviewer Comments:					
<p>D. RFP Dissemination and Review of Proposals Received</p> <p>The Fiscal Agent will collaborate with the MDE to disseminate competitive RFPs as may be required to solicit, evaluate and make recommendations for subgrants, contracts and awards to MI Excel SSoS partners. Such RFPs will be prepared by the Fiscal Agent, in conjunction with the MDE, and the Fiscal Agent will announce and disseminate the RFPs, receive applications, evaluate proposals and make recommendations for the subgrant or contract award. At the direction of the MDE, the Fiscal Agent will issue a contract or subgrant award to the successful applicant organization.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>	5	4	3	2	1
Reviewer Comments:					

II. Implementation of the Fiscal Agent Role as Subgrantee for the Title I MI Excel Statewide System of Support Technical Assistance Grant - Continued 5 points Each, 50 points possible this section	Superior	Good	Average	Limited	Poor
<p>4. RFP Deliverable 3.4 Narrative # 5: 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, including:</p> <ul style="list-style-type: none"> <input type="checkbox"/> 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. <input type="checkbox"/> The proposal provides evidence of the agency’s most recent 5-year experience with state and federal programs, audit and monitoring results, and findings verifying appropriate internal controls are in place. 	5	4	3	2	1
Reviewer Comments:					
<p>5. RFP Deliverable 3.5 Narrative # 6: 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 MI Excel partner organizations/sub grantees, including:</p> <ul style="list-style-type: none"> <input type="checkbox"/> A comprehensive and well developed description of project accounting policies, procedures, and methods is provided. <input type="checkbox"/> A comprehensive and well developed description of how the Subgrantee will communicate with and report to the MDE and participating organizations/subgrantees is provided. Appropriate timelines are included in the response. <input type="checkbox"/> 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. <input type="checkbox"/> A comprehensive and well developed description of inventory policy, procedure, and methods is provided for assets acquired through this Grant. <input type="checkbox"/> A comprehensive and well developed description of required accountability and adherence to the Education Department General Administrative Regulations (EDGAR), Parts 76 and 80, Office of Management and Budget Circular A-133, A-110, and other applicable Grants Management Circulars and audit requirements. <input type="checkbox"/> A comprehensive and well developed description of a plan for monitoring and audit of subgrantees and vendors that ensures their adherence to Scope of 	5	4	3	2	1

II. Implementation of the Fiscal Agent Role as Subgrantee for the Title I MI Excel Statewide System of Support Technical Assistance Grant - Continued 5 points Each, 50 points possible this section	Superior	Good	Average	Limited	Poor
<p>Work, contracts, and applicable federal and state requirements for subgrantees and vendors receiving Title I funds. Describe how the Fiscal Agent will ensure subgrantees and vendors are not excluded or debarred from receipt of federal funds.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>					
Reviewer Comments:					
<p>6. Deliverable 3.6 Narrative # 7: Reporting</p> <p>The Fiscal Agent is responsible for submitting all required reports to the MDE. These reports, at a minimum shall consist of:</p> <ul style="list-style-type: none"> <input type="checkbox"/> detailed annual report of: <ul style="list-style-type: none"> <input type="radio"/> Total program activities and expenditures <input type="radio"/> Activities and expenditures by participating organization/subgrantee <input type="checkbox"/> monthly updates on: <ul style="list-style-type: none"> <input type="radio"/> Total program activities and expenditures <input type="radio"/> Activities and expenditures by participating organization/subgrantee <p>The Fiscal Agent must ensure that participating organizations/subgrantees 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.</p> <p>The Fiscal Agent must attend team meetings and provide updates on grant activities and deliverables to the fiscal agent, the MDE and other MI Excel SSoS partners, as directed by the MDE/OEII.</p> <p>The narrative must propose how the applicant would implement the above as Fiscal Agent for the MDE.</p>	5	4	3	2	1
Reviewer Comments:					
Total this section: (50 points possible)					

III. Staffing and Budget (Narrative #8 & #9) 5 points Each, 1 points possible this section	Superior	Good	Average	Limited	Poor
<p>1. Management, Staffing, Organizational Chart Narrative #8: Staffing and Budget Management, Staffing, and Organizational Chart (original and redacted versions; however, do not include names or identifying information in redacted versions).</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide a proposal for key personnel who will implement this subgrant. A review of each application will be made to determine whether the qualifications of key personnel are appropriate. Describe key personnel in the subgrantee's organization that will provide fiscal oversight. <ul style="list-style-type: none"> <input type="radio"/> The proposal must provide 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. 	5	4	3	2	1
Reviewer Comments:					
<p>2. Budget Plan Narrative #9: Budget Plan (original and redacted versions; however, do not include names or identifying information in redacted versions):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide a detailed project budget, one that covers a partial year (nine months of implementation January 1, 2015, through September 30, 2015). <input type="checkbox"/> The applicant's budget for nine month implementation (January 1, 2015, through September 30, 2015) may not exceed \$5,966,789. <input type="checkbox"/> Include salaries and/or stipends for all participants to be funded with the grant funds and a detailed description of all other resources required for project completion. 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 Expenditure Function Codes (pages 24-32) from the Appendix-Definitions of Account Codes, to the Michigan Public School Accounting Manual: http://www.michigan.gov/documents/appendix_33974_7.pdf. <input type="checkbox"/> The Budget Detail should be expanded to accommodate the level of detail required to assess its breadth and completeness, and whether costs are reasonable. 	5	4	3	2	1
Reviewer Comments:					

III. Staffing and Budget (Narrative #8 & #9) 5 points Each, 1 points possible this section	Superior	Good	Average	Limited	Poor
3. Budget Plan Narrative #9 (continued): The budget is cost effective to support the project and shows a clear and detailed relationship between budget items and project objectives. The budget demonstrates realistic costs and an understanding of appropriate fiduciary responsibilities; the budget clearly identifies indirect and administrative expenses.	5	4	3	2	1
Reviewer Comments:					
Total this section: (15 points possible)					

IV. Overall RFP 5 points possible this section	Superior	Good	Average	Limited	Poor
Overall RFP: Overall RFP completeness, organization, detail, and the likelihood of the applicant's ability to meet the identified deliverables. The RFP and proposed activities are clear and convincing, with sufficient detail to support implementation. Proposed activities, paired with the applicant's demonstrated success in implementation of similar projects is compelling in its presentation. The applicant's past and current project successes are demonstrated through data and examples.					
Reviewer Comments:					
Total this section: (5 points possible)					

Final Score			
Possible		Total	Overall Reviewer Comments:
25	Section I		
50	Section II		
15	Section III		
5	Section IV		
95	TOTAL SCORE		
NOTE: A total of 95 points is possible; however, a minimum of 76 points must be obtained for consideration of proposal.			