



**Office of Special Education
Request for Proposal**

TITLE: Statewide Mandated Activities Project, "Training and Technical Assistance for Family Involvement" Under the Individuals with Disabilities Education Act (IDEA)

REQUEST FOR PROPOSAL DUE: 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., Thursday, April 17, 2014** by **Ms. Liz Hengesbach** at the following address:

Michigan Department of Education
Office of Special Education
P.O. Box 30008
Lansing, Michigan 48909

Or

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

Michigan Department of Education
Office of Special Education
608 West Allegan Street
Lansing, Michigan 48933

DATE OF ISSUE: Thursday, February 20, 2014

SECTION I: General Information for the Bidder

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

I-A INTRODUCTION

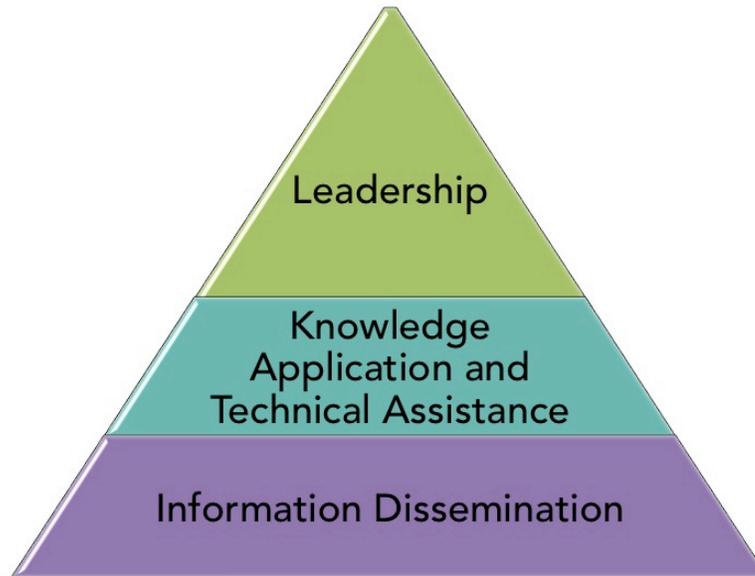
Parent involvement is a critical element of both Part B and Part C of the Individuals with Disabilities Education Act (IDEA). The parents' role as members of decision-making teams and committee members in creating Individual Education Programs (IEPs) was established in 1975 by the Education for All Handicapped Children Act, now known as IDEA. As part of the reauthorization of IDEA in 1997, Congress emphasized parents' rights and responsibilities as necessary ingredients for appropriate and individualized education programming and mandated that schools provide the opportunity for active parental participation in the decisions about the education of their children. When IDEA was reauthorized in 2004, parent responsibilities were emphasized.

The involvement of parents in the IEP process has many benefits such as improving the communication between parents and the school and increasing the school's understanding of the child and his/her environment. In addition, parent involvement increases the likelihood that mutually agreed upon educational goals will be attained. Benefits for parent and family involvement during early intervention in the development of the Individual Family Service Plan (IFSP) are similar to those for the IEP, especially when parents are full and equal members of the *Early On*[®] team and are actively involved in creating the IFSP.

Parents of children with disabilities, many who may be faced with complex issues regarding their child, need support to be active participants in the education partnership planning required by IDEA. The special education and early intervention process may seem overwhelming. In response to the need to support parents, the Michigan Department of Education (MDE), Office of Special Education (OSE) and Office of Great Start/Early Childhood Education and Family Services (OGS/ECE&FS) has, over many years, provided ongoing funding support to a number of organizations so the organizations can provide information for and assistance to parents of children with disabilities.

Statewide System for Early Dispute Resolution

Based on state responsibilities and the information gained from the feedback from Michigan parents of children with disabilities, the OSE and OGS/ECE&FS are now seeking proposals for a Statewide Initiative for Family Involvement that will address three critical aspects of the system as illustrated in the graphic below.



The successful bidder will be responsible for developing, maintaining and/or implementing a statewide initiative that will:

1. Serve as the source of relevant information regarding resources and services available for children with disabilities throughout the state;
2. provide statewide information dissemination regarding the state of Michigan's messaging;
3. include a training component to support parents' efforts to assist their children to prepare to lead independent and productive lives to the maximum extent possible;
4. include a training component that will support school districts efforts to meaningfully include parents and families of children with disabilities; and
5. facilitate parent participation in leadership opportunities made available through community, local, regional, and state activities.

Prospective bidders should be aware that all states must report on a number of indicators that measure each state's progress in carrying out the mandates of IDEA. The U.S. Department of Education, Office for Special Education Programs (USDOE/OSEP) requires all states to submit a State Performance Plan (SPP) that must be updated annually in the Annual Performance Report (APR). An indicator for the SPP/APR for Part B requires states to determine the "Percent of parents with a child receiving special education services who report that schools facilitated parent involvement as a means of improving services and results for children with disabilities." The Part C SPP/APR indicator requires states to determine the percent of families participating in Part C who report that early intervention services have helped the family: (a) know their rights; (b) effectively communicate their children's needs; and (c) help their children develop and learn.

I-B PURPOSE

The purpose of this grant is to create and/or maintain a comprehensive, integrated, responsive statewide system of support and information for parents and families of children with disabilities and school districts. This coordinated system will provide parents, families and school districts with accurate and timely information, resources and services; support parents, families and school districts in effective collaboration and partnering; and will deliver systemic training to prepare parents and families to demonstrate leadership in their interactions with service providers and/or in positions of leadership on state, regional and local decision-making committees. The project will collaborate with other Mandated Activities Projects, also whose oversight is provided by the OSE and local agencies in ensuring broad access and support for parents and families of children with disabilities. In addition, the project will partner with the MDE in conducting statewide surveys that collect data pertinent to family involvement.

The proposed outcomes for the grant are:

Information Outcomes

- A. Information disseminated to parents of infants, toddlers, children and youth with disabilities will be relevant and accurate and will reflect research-based information.
- B. Trainings will be developed and implemented for parents and families of children with disabilities on such topics as: transitioning from Part C of IDEA to Part B of IDEA, requesting up-to-date progress monitoring data, the parents role in their child's progress towards goals, IFSP and IEP development, procedural safeguards and becoming an active member of the school community.

- C. Training will be developed and implemented for school districts on recruiting parents and families of children with disabilities, the benefit of having parent input in decision-making, and trainings sessions for both parents and families of children with disabilities and school districts on the following topics: procedural safeguards, informal resolution, assistive technology, understanding the IEP and IFSP process and transition from Part C to Part B of IDEA and to elementary, middle, high school and post-secondary programs.
- D. The initiative will present the material developed to both parents and educators at Professional Development Days.
- E. Parents, including those typically underserved, will be connected to organizations or resources that support their child's development and learning.

Knowledge Application Outcomes

- F. Parents will be active participants in the development and implementation of their child's IEP and/or IFSP.
- G. Parents will demonstrate the capacity to facilitate change for their children.
- H. School districts will be actively seeking parent input in the educational decisions of children with disabilities.

Leadership Outcomes

- I. Parents who serve as mentors and those in advisory roles critical to the *Early On* and special education system, namely parents who serve on the Michigan Interagency Coordinating Council (MICC), the Special Education Advisory Committee (SEAC), Parent Advisory Committees (PACs), and Local Interagency Coordinating Councils (LICCs), will demonstrate an understanding of their roles and the application of leadership skills in these settings.
- J. Parents will be active participants in state, regional, and local systems change activities affecting policy and processes affecting children with disabilities.

THE PRIORITY:

This priority supports the establishment of a statewide initiative for Family Involvement. This INITIATIVE will provide parents of children with disabilities, including those families who are typically underserved, with the relevant information and assistance they need to enable them to participate effectively in helping their child with disabilities to meet identified developmental, academic achievement, and functional goals; and, support their efforts to assist their child to prepare to lead independent and productive lives, to the maximum extent possible. In addition, this initiative will support and train school districts on the value of parent participation and how to meaningfully engage parents in educational decisions and change based on evidence based research and practices.

This INITIATIVE will also facilitate parent participation in leadership opportunities made available through community, local, regional, and state activities.

Clarification of the Priority:

Funded under IDEA, this INITIATIVE will:

- Establish a single service provider that will provide central information and parent-mentoring services statewide;
- serve parents/families of infants, toddlers, and children, from ages birth through 26, who have the full range of disabilities as described in section 602(3) of IDEA, including outreach to underserved parents/families who may be homeless, be ethnic minorities, have limited English proficiency, or other obstacles to participation;
- provide up-to-date, relevant information, technical assistance, and training, including leadership development, to meet the needs of parents of children with disabilities living in the geographic areas served;
- provide up-to-date, relevant information, technical assistance, and training, including the value of parent/school collaboration to meet the needs of parents and families of children with disabilities;
- engage in collaborative planning with the MDE, OSE and OGS/ECE&FS to ensure that requirements of IDEA 2004 and the State Performance Plan (SPP)/Annual Performance Report (APR), and other general supervision responsibilities of the state are being met;
- coordinate the project's efforts and activities with other projects and agencies that support the needs of parents and families in Michigan to reduce the duplication of effort; and
- implement project management methodologies and evaluation including, but not limited to, external evaluation that facilitates data based decision-making and increases programmatic efficiency and fiscal responsibility.

I-C ISSUING OFFICE

This Request for Proposal (RFP) is issued for the State of Michigan by the MDE, OSE. The OSE is the sole point of contact in the State for this RFP. All inquiries relating to this grant should be addressed to:

Mr. John Andrejack, Supervisor, Program Finance
Office of Special Education
2nd Floor, John Hannah Building
P.O. Box 30008
Lansing, MI 48909

I-D GRANT ADMINISTRATOR

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

I-E TYPE OF GRANT

It is proposed that, if a grant is entered into as a result of this RFP, it will be a time and materials negotiated grant. Negotiations may be undertaken with the bidder who appears to be the most qualified, responsible, and capable of performing the work outlined in this RFP. The successful bidder will meet with the MDE, OSE to finalize all details of the grant award including any changes or modifications requested by the MDE. The initiative will be a component of the MDE's statewide plan for the implementation of IDEA and, as such, is subject to changes or modifications as directed by the MDE. Any equipment purchased is subject to the Education Department General Administrative Regulations (EDGAR) found in Appendix B. The grant that may be agreed upon will be the most advantageous to the State, price, and other factors considered. The State reserves the right to consider proposals and modifications thereof received at any time before the award is made, if such action is in the interest of the State.

I-F FUNDING

The proposal will be awarded up to \$1,150,000 with IDEA, Part B, Section 611 and \$93,000 with IDEA, Part C mandated activities funds. Funding will be effective following the approval of the grant awards by the State Superintendent. The funding period is twelve months for each grant beginning October 1, 2014 and ending September 30, 2015 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 under the IDEA, Part B, Section 611 and IDEA, Part C mandated activities funds.

I-G ELIGIBLE APPLICANTS

Eligible applicants include intermediate school districts, local education agencies, including public school academies, institutions of higher education, private profit and non-profit organizations, including parent and advocacy organizations, and others with demonstrated experience in providing the products and services specified in the RFP. All who plan to submit a proposal, must contact Ms. Liz Hengesbach at (517) 241-1235 prior to the proposal due date of **Thursday, April 17, 2014** so that the appropriate number of review panelists can be secured.

I-H RESPONSE DATE

To be considered, proposals must arrive at the OSE 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 OSE. Late proposals and proposals submitted electronically or by facsimile will be returned to the applicant ***without review***.

I-I REJECTION OF PROPOSALS

The MDE, OSE 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 State Superintendent. 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, OSE with progress reports describing the project's progress on the approved work plan. The MDE, OSE 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, OSE at any time. The MDE, OSE 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, OSE before dissemination. All products and materials must include the following statement:

This document was produced through an IDEA Mandated Activities Grant titled, "enter project title here..." 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 Special Education, P.O. Box 30008, Lansing, Michigan 48909.

I-L APPLICANT'S CONFERENCE

There will be an applicant's conference call on March 4, 2014 from 3:00 p.m. to 4:00 p.m. If you have questions or need clarification regarding the work to be performed, please contact John Andrejack at (517) 241-1235 or Beth Horne at (517) 373-2949.

The OSE retains the right to modify this RFP, if it is 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, OSE of their intent to submit a proposal.

I-M ADDENDUM

In the event that it becomes necessary for the OSE 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, OSE 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 OSE 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 60 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.***

I-P GENERAL REQUIREMENTS

The MDE, OSE encourages applicants to apply standards as required in IDEA. As such the applicant should demonstrate efforts to employ and/or advance in employment qualified individuals with disabilities in project activities (as described in section 606 of IDEA); and the applicants should also involve individuals with disabilities or parents of individuals with disabilities ages birth through 26 in planning, implementing, and evaluating the projects (see section 682(a)(1)(A) of IDEA).

I-Q APPLICABLE REGULATIONS

- (a) The Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 74, 75, 77, 79, 80, 81, 82, 84, 85, 86, 97, 98, and 99; and
- (b) The selection criteria for this program are from 34 CFR 75.210.

SECTION II: Work Statement

II-A STATEMENT OF NEED

To create and/or maintain the existing comprehensive, integrated, responsive statewide system of support and information for parents, families and school districts for children with disabilities. This coordinated system will provide parents, families and school districts with accurate and timely information, training, resources and services; support parents, families and school districts in the application of effective collaboration and partnering. This system will also deliver systemic training that prepares parents and families to demonstrate leadership in their interactions with service providers and/or in positions of leadership on state, regional, and local decision-making committees.

II-B GRANT GOALS

The Applicant MUST ADDRESS the following goals:

Information Dissemination

Goal I: Development of an information management and dissemination system using a variety of technology applications and methodologies to collect and disseminate information and materials that are relevant to the needs of parents and families of children with disabilities and school districts. The system should include:

- Guidelines that govern the INITIATIVE's obligations and responsibilities in disseminating information including protocols and processes that ensure relevancy, accuracy, utility, and accountability for two subgroups (parents and families of children with disabilities and school districts) including:
 - A database of relevant information such as procedural safeguards, etc.;
 - a variety of formats to reach all parents;
 - use of variety of technology-based strategies that will provide parents, families and school districts with direct access to information from the grantee partner projects, MDE, OSE, and OGS/ECE&FS the Great Start Collaborative and a wide array of local and national resources;
 - a database of organizations, agencies, and services that will be used for referring families to statewide and local community resources;
 - a cross agency calendar of trainings available to parents, families and school districts;
 - strategies to coordinate information across collaborative partners and the MDE, OSE and OGS/ECE&FS;

- linking and brokering services to other organizations for families of children with disabilities;
- processes that help eliminate duplication of information, services, and training;
- a system of outreach for underserved families, including families who may be homeless, ethnic minorities, have limited English proficiency, or other obstacles; and
- effective marketing strategies to promote the use of the project's information, training, and services.

Evaluation of this goal will include the extent to which those accessing the project's services report that:

- Information about the availability of this source of information was widely available throughout Michigan;
- information they received regarding resources was accurate, relevant, and helpful; and
- parents and families of children with disabilities are able to understand the nature of their children's disabilities and their educational, developmental, and transitional needs as a result of information received.

Knowledge Application and Technical Assistance

Goal IIA: Develop a statewide mentoring program for parents and families of children with disabilities that includes:

- A parent training program that builds on the concepts of nationally recognized curriculum to assist parents with understanding and navigating the educational and early intervention systems, understanding and using data to facilitate development of appropriate educational and family service programs, knowing about all aspects of procedural safeguards and other pertinent information, and establishing collaborative partnerships with school and early intervention personnel;
- develop a checklist or materials for parents and families of children with disabilities that they may use to help them through the process of when a district is dissolved or consolidated with another;

- parent trainings on such topics as: transitioning from Part C of IDEA to Part B of IDEA, requesting up-to-date progress monitoring data, the parents role in their child's progress towards goals and becoming an active member of the school community, understanding the birth to three process, and the differences between Part C of IDEA, Michigan Mandatory Special Education and Part B of IDEA;
- developing operating guidelines that include complete information about the selection, responsibilities, training, and support of mentors;
- designing protocols and processes for parent mentors to use when assisting parents;
- developing guidelines on the role of the parent mentor in the child find process;
- develop strategies for increasing parent participation in educational decisions and committees in the local school district;
- coordinating with regional entities such as Intermediate School Districts (ISDs), PACs, the Great Start Collaboratives or local entities such as LICCs to pilot the mentoring program;
- evaluating the impact of the mentoring program including the extent to which parents use the services provided and the skills learned; and
- recruit a minimum of five parents up to a maximum of 10 parents representing each of the regions of the State to participate in the Parent Leadership in State Government Initiative.

Goal IIB: Develop a statewide training and technical assistance program for school districts that includes:

- Training that concentrates on the following topics: the benefits of parent participation in the school community as demonstrated through research based practices, engaging parents and families of children with disabilities in their child's education, recruiting parents and families of children with disabilities, the benefit of having parent input in decision-making, understanding federal State Performance Plan/Annual Performance Report indicators surrounding family and child outcomes; and
- trainings sessions for both parents and families of children with disabilities and school districts on the following topics: procedural safeguards, informal resolution, assistive technology, understanding the IEP process and transition from Part C to Part B of IDEA and to elementary, middle, high-school and post-secondary programs, a local school district training program that concentrates on the benefits of parent participation in the school community.

Evaluation of these goals will include improving the extent to which parents trained by mentors report that:

- They knew their rights and were able to effectively communicate their children's needs in IEP, IFSP or other meetings related to their child's educational and developmental programming;
- having access to mentors who are available to help them support their child's development and learning has contributed toward helping them to be more effective participants in decisions regarding their children;
- they were better able to communicate effectively and work collaboratively with personnel responsible for providing special education, early intervention services, transition services, and related services;
- their input was respected and valued during the IFSP and IEP processes;
- that schools facilitated parent involvement as a means of improving services and results for children with disabilities; (20 U.S.C. 1416(a)(3)(A));
- they are better equipped to be active participants in state, regional, and local decision-making groups; and
- they have access to support groups consisting of other parents of children with disabilities.

Leadership Training

Goal III: Develop a process for the systematic implementation of professional and sustained learning opportunities for parents and families of children with disabilities to increase their knowledge and use of strategies to support their child and/or engage in leadership opportunities in a variety of leadership roles. This should include but not be limited to the development of:

- A parent leadership training program that develops the skills and knowledge needed to actively participate in state, regional and local decision-making groups, such as SEAC, MICC, PACs and LICCs and others.

Evaluation of this goal will include improving the extent to which parents participating in the project activities report that:

- They are better equipped to be active participants in state, regional, and local decision-making groups; and
- participatory involvement with advisory committees such as MICC, LICC, SEAC, PACs, PTA, School improvement Teams, or in other advisory capacities.

Project Coordination

Goal IVA: Develop and implement a systemic plan to coordinate with other information, technical assistance, and training service providers such as the MDE, OSE and OGS/ECE&FS and their state and federally funded initiatives, other agencies and projects, including disability organizations serving parents and families of children with disabilities and the Great Start Collaborative. This plan should include the development of:

- Collaborative strategies for outreach to underserved families including culturally and ethnically diverse communities;
- collaborative activities that increase the systemic impact of state, regional, and local technical assistance efforts to support parents to be active participants in the education of their children; and
- a process to identify materials not currently available to parents and families including research-based practices and develop a long-range plan for acquisition and/or development.

Goal IVB: Coordinate with the MDE, OSE and OGS/ECE&FS on a quarterly basis to ensure alignment with the SPP/APR requirements, the Continuous Improvement and Monitoring System (CIMS), other General Supervision responsibilities, and other MDE initiatives that support parents and families. Assist in the development of the SPP/APR for indicators relating to parent involvement.

Goal IVC: Partner with local/regional entities (such as school districts, ISDs, RESAs, Great Start Collaborative, etc.) to increase the parent-mentoring program. This should include:

- Identifying opportunities for partnering and/or obtaining matching funds to support expansion of the parent-mentoring program to additional regions of the state; and
- planning strategies collaboratively for long-term implementation and expansion of the parent-mentoring program.

The evaluation of these goals should include determining the extent to which the project can:

- Increase the number of agencies and projects participating in collaborative activities;
- increase the number parents/families of children with disabilities who report using the information, products, and services resulting from collaborative activities;
- increase the number of partners involved in the parent-mentoring program; and

- demonstrate the effectiveness of the project to work with MDE, OSE and OGS/ECE&FS to align with the SPP/APR requirements, the Continuous Improvement and Monitoring System (CIMS), other General Supervision responsibilities, and other MDE initiatives.

The applicant is encouraged to clearly address all goals in response to this Request for Proposal. Additional application instructions can be found in the selection criteria described in the pages that follow.

II-C REVIEW PROCESS

All proposals will be reviewed using a two-tiered review process, including a peer review system. Award selections will be based on merit, as determined by points awarded in accordance with the Review Selection Criteria Section (Appendix B), all relevant information provided in the proposal, and final review considerations. Based on this process, the MDE, OSE will provide formal funding recommendations to the State Superintendent.

The maximum score for the following criteria is 100 points. In addition to the content of the categories below, the State Superintendent may apply other factors in making funding decisions, such as the performance of the fiscal agent on previously funded initiatives. Proposals should be developed to reflect the outline of the criteria.

Statement of Need	15 points
Management Summary and Work Plan	40 points
Organizational Capacity and Human Resources	25 points
Evaluation	10 points
Budget	10 points

II-D SELECTION CRITERIA

The selection criteria should be used as a guide when writing the proposal. The reviewers will judge all proposals according to the elements described in the criteria. The proposal most likely to be funded is the one that has most completely addressed all of the elements described in the criteria in Appendix B.

SECTION III: Information Required from Bidder

The bidder's proposal is to be submitted in the format outlined below. Use only the alphabet 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 STATEMENT 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 problem statement from the RFP. Support this understanding with examples of existing studies if possible.

III-D MANAGEMENT SUMMARY AND WORK PLAN

1. Narrative

Include a narrative summary description of the proposed service effort and of the product(s), if any, that will be delivered. Provide a clear statement of the annual goal(s) for the project which will serve as the foundation for the work plan. The design must have an effective plan of management including input, process and output measures for each objective. Identify the materials that will be delivered and the outcomes to be achieved as well as their anticipated services on the education community.

2. Technical Work Plans

Provide a technical plan for accomplishing the work. Make specific reference to the objectives in the RFP and to the service required and/or products listed. Include a PERT chart or other display, time related, showing each event, task, and major decision point in your work plan.

Describe how educational equities based upon considerations of sex, race, and disability will be addressed within the objectives of the work statement. Describe a formative/summative evaluation plan appropriate to the work and a brief rationale for the design proposed.

III-E ORGANIZATION CAPACITY AND HUMAN RESOURCES

1. Prior Experience

The organization must show the ability to perform the work. Proposals should include descriptions of qualifying experience to include project descriptions, costs, and starting and completion dates of projects successfully completed. Particular attention is given to evidence of completed activities similar to those stated in the RFP. Also, include the name, address, and phone number of the responsible official of the client organization who may be contacted about the projects listed.

2. Project Staffing

The contracting agent(s) must be able to staff the project with personnel who possess skills and expertise in fiscal management. Include the number of professional personnel that will be employed in the work by skills and qualifications. Show where personnel will be physically located during the time they are engaged in the work. Indicate which of these individuals are considered key to the successful completion of the study or project. Identify key individuals by name and title and indicate the amount of dedicated management time assigned for the project manager and other key individuals. Resumes reflecting qualifications are required for proposed project personnel.

List all subcontractors; include firm name and address, contact person, complete description of work to be subcontracted. Include descriptive information concerning subcontractor's organization and abilities.

III-F EVALUATION

The applicant will identify the proposed evaluation methods that will be used to measure the project goals and objectives. The applicant will collect and analyze data as part of the project evaluation.

III-G BUDGET

A budget template is provided in Appendix D. Bidders should describe their organization's capacity to manage the budget. Bidders should also complete, to the best of their ability, the sections of the budget including a Budget Narrative. This includes outlining any potential miscellaneous or other expenses, including staff (noting FTE), 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.

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.

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-G – IV-L. Include budget section, resumes of principal staff and signed letters of commitment from all sub-contractors named in the proposal. All other appended material will be read at the reviewer's discretion.

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. Thursday, April 17, 2014** by **Ms. Liz Hengesbach** at the following address:

Michigan Department of Education
Office of Special Education
P.O. Box 30008
Lansing, Michigan 48909

Or

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

Michigan Department of Education
Office of Special Education
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, OSE.

IV-D ACCOUNT AND AUDIT REQUIREMENTS

The applicant will maintain a separate accounting of expenditures for the grants 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 the Grants. Generally accepted accounting procedures will be used. The Agency's independent auditor will be made aware of the grants 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 these grants will not be charged to any other state or federal source and should follow federal guidelines including but not limited to EDGAR and OMB Circular A-87. These grants 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 these grants 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.

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 therefrom, 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 RFP, 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 non-resident 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 therefrom, 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 sub-paragraphs (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. 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 U.S. Department of Education 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 insure continuity and adherence to stated OSE 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 recipient. The MDE, OSE can cancel the grant with 30 days written notice for:

- Default of the Contractor.
- In the event the OSE 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 OSE determines that statewide implementation of the Contract is not feasible.
- Reduction in or elimination of funding allocations to the MDE under the IDEA, or any sub-part of the IDEA.
- 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 the RFP may be included by reference in any Grant Agreement based on the RFP. See Appendix A.

Appendix A

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

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 Michigan Department of Education. I hereby state that I have not communicated with, nor accepted anything of value from an employee of the Office of Special Education 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 Michigan Department of Education grant in the amount and for the purposes set forth in this proposal.

Signature of Authorized Official	Title	Date
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**Mandated Activities Project
Statewide Training and Technical Assistance for Family Involvement Grant**

RUBRIC

A. Statement of Need

In reviewing the significance of the proposed project the MDE, OSE will consider how well the applicant demonstrates the potential contribution of the proposed project.

This section is worth a maximum of **15 points**.

Exemplary	Moderate	Low
<p>The proposal:</p> <p>Provides the clear, concise and detailed description of the project component; where applicable, it references models or research based practices; illustrates application of ideas, concepts and practices that will meet the needs of the MDE, OSE; and has a measurable evaluation plan to determine project effectiveness.</p>	<p>The proposal:</p> <p>Addresses the project component; provides sufficient detail to illustrate the application of ideas, concepts and practices.</p>	<p>The proposal:</p> <p>Does not adequately address this component.</p>
Significance 10 Points Maximum		
Description	Independent Rating	Score
The proposal describes the potential contribution of the proposed project to increase collaboration and partnerships between parents, school, and early intervention personnel resulting in better outcomes for young children and students with disabilities.	0 3 5	
The proposal describes the project's ability to build local capacity to provide, improve or expand the services that address the needs of parents of children with disabilities.	0 3 5	
The proposal describes the project's ability to create a seamless system of information dissemination, technical assistance, and support that builds the capacity of parents and families of children with disabilities and school districts and foster leadership opportunities for parents.	0 3 5	
Comments:		
Section Total: _____		

B. Management Summary and Work Plan

The proposal describes how the applicant will provide a clear statement of the project goals. The project design describes an effective and detailed plan of management including input, process and output measures. Applicant must provide a clear description of the project responsibilities and protocols to be carried out, including a plan for communicating and coordinating with the MDE, OSE, other IDEA mandated activities projects, and special education stakeholders and partners.

This section is worth a maximum of **40 points** (Section 2a is worth a maximum of 25 points and Section 2b is worth a maximum of 15 points).

2a. Comprehensive design that addresses each objective, task and benchmarks sequenced clearly with described and feasible timelines.

Exemplary	Moderate	Low
<p>The proposal:</p> <p>Includes a detailed plan that includes:</p> <ul style="list-style-type: none"> • The project objectives outlined in the RFP. • The annual goals for the proposed project. • The activities, resources and outcomes proposed for each objective. • The specific and essential project development milestones sequenced in a feasible timeline. • The array of services and projects that will support each objective with an emphasis on capacity building. <p>Provides a detailed description of how the proposed activities will:</p> <ul style="list-style-type: none"> • Align with project goals and objectives. • Raise awareness among target audiences. • Provide opportunities for sustained learning. • Build capacity among the target audiences, and <p>Provides a detailed description of specific products and services to be developed and an organized and effective method of delivering the products to the target audience in a timely manner.</p>	<p>The proposal:</p> <p>Includes a general overview of the goals and objectives and the impact each will have on the parent community.</p> <p>Provides a general description of the products and services to be designed and an effective method of delivering these products to the target audience.</p> <p>Services and products show some promise in supporting project goals and objectives. Focus on events such as conferences and workshops more than sustained learning.</p> <p>Includes a general description of some of the essential product development milestones, sequenced in a timeline that may be feasible.</p>	<p>The proposal:</p> <p>Includes little or no overview of the goals and objectives and the impact each will have on the parent community.</p> <p>Provides little or no description of the products and services being designed and does not have an effective method of delivering the products to the target audience.</p> <p>Services and projects show limited promise in supporting project goals and objectives.</p> <p>Provides little or no information about the essential project development milestones. The timeline is no feasible.</p> <p>Includes little or no description of how the learning opportunities and support will be coordinated with existing programs, and be used to sustain the strategies designed beyond the funding period.</p>

<p>Includes a comprehensive description of how the learning opportunities and support will be coordinated with existing programs and be used to sustain the strategies designed beyond the funding period.</p> <p>Includes a comprehensive and well developed description of how the grantee will communicate with and report to the OSE.</p>	<p>Includes a general description of how the learning opportunities and support will be coordinated with existing programs, and be used to sustain the strategies designed beyond the funding period.</p>	
Management Summary and Work Plan 2a - 25 Points Maximum		
Description	Independent Rating	Score
<p>The proposal includes a detailed plan for the proposed project that clearly outlines annual goals, activities and resources and the array of services and projects that will support each objective with an emphasis on capacity building. Additionally, the plan includes activities and subsequent milestones in a feasible timeline.</p>	0 3 5	
<p>The proposal provides a detailed description of how the proposed activities will align with project goals and objectives and provide opportunities for sustained learning. Raises awareness and builds capacity among target audiences.</p>	0 3 5	
<p>The proposal details the specific products and services to be developed and an organized and effective method of delivering the products to the target audience in a timely manner to achieve project goals.</p>	0 3 5	
<p>The proposal includes a comprehensive description of how the learning opportunities and support will be coordinated with existing programs and be used to sustain the strategies designed beyond the funding period.</p>	0 3 5	
<p>The proposal includes a comprehensive and well developed description of how the grantee will communicate, coordinate with and report to the OSE.</p>	0 3 5	

2b. Development of project protocols in collaboration with the MDE, OSE.

Exemplary	Moderate	Low
<p>The proposal:</p> <p>Provides a detailed description of how the project will be coordinated including such procedures as:</p> <ul style="list-style-type: none"> • The process and criteria for selecting training topics. • The process and criteria for selecting training methods to maximize statewide impact. • The procedures for scheduling and coordinating learning opportunities. 	<p>The proposal:</p> <p>Provides a general description of how protocols will be developed and coordinated.</p>	<p>The proposal:</p> <p>Provides little or no description of how protocols will be developed and coordinated.</p>

Management Summary and Work Plan 2b. - 15 Points Maximum		
Description	Independent Rating	Score
The proposal provides a detailed description of how the project will coordinate procedures and protocols (example: process and criteria for selecting training topics).	0 3 5	
The proposal provides a detailed description of how the project will coordinate procedures and protocols (example: the process and criteria for selecting training methods to maximize statewide impact).	0 3 5	
The proposal provides a detailed description of how the project will coordinate procedures and protocols (example: the procedures for scheduling and coordinating learning opportunities).	0 3 5	
Comments:		
Section Total: _____		

C. Organization Capacity and Human Resources

Applicant must describe the organization’s ability to achieve project objectives on time and within the budget. A review of each application will be made to determine whether the qualifications of key personnel are appropriate.

This section is worth a maximum of **25 points** (Section 3a is worth a maximum of 15 points and Section 3b is worth a maximum of 10 points).

3a. The applicant must show the ability to support and manage a statewide initiative.

Exemplary	Moderate	Low
<p>The proposal:</p> <p>Includes a detailed description of the abilities of the applicant, project staff, and consultants or contractors to perform the described work (e.g., previous experience and successes on similar projects). Must include resumes for each staff member and descriptive information concerning sub-contractor’s organization and abilities.</p> <p>Includes a detailed technical plan that supports the accomplishment of objectives which should include:</p> <ul style="list-style-type: none"> • A complete explanation of the roles and responsibilities of the project staff, subcontractors or consultants, • Time allocation for project staff. <p>Provides substantial evidence that the applicant will be able to develop and maintain systems of communication using multiple formats, including electronic, for the purposes of:</p> <ul style="list-style-type: none"> • Responding to frequent asked questions. • Providing technical assistance to parents. • Dissemination of pertinent information to target audiences. • Providing links to national sites for information and technical assistance. • Providing timely information on upcoming learning opportunities at the regional, state and local level. • Providing technical assistance. 	<p>The proposal:</p> <p>Includes a general description of the abilities of the applicant, project staff and consultants or contractors to perform the described work.</p> <p>Includes a general description of the technical plan.</p> <p>Provides some evidence that the applicant will be able to develop and maintain the communication system described in “Exemplary.”</p>	<p>The proposal:</p> <p>Includes little or no description of the abilities of the applicant, project staff and consultants or contractors to perform the described work.</p> <p>Includes a vague or incomplete technical plan.</p> <p>Provides little or no evidence that the applicant will be able to develop and maintain communication systems.</p>

Organization Capacity and Human Resources 3a - 15 Points Maximum		
Description	Independent Rating	Score
<p>The applicant must show the ability to support and manage a statewide initiative. This includes:</p> <ul style="list-style-type: none"> • Includes a detailed description of the abilities of the applicant, project staff, and consultants or contractors to perform the described work. • Includes a detailed technical plan that supports the accomplishment of objectives. • Provides substantial evidence that the applicant will be able to develop and maintain systems of communication. 	0 7 15	

3b. The applicant must show the ability to collaborate and communicate with the MDE, OSE, other IDEA mandated activities projects, and special education stakeholders and partners.

Exemplary	Moderate	Low
<p>The proposal:</p> <p>Provides a detailed plan for establishing and supporting collaboration and communication networks with appropriate stakeholders and partners; and supporting collaboration, communication, and coordination with the MDE, OSE. The stakeholders and partners identified include the full range of partners necessary to complete the proposed projects goals and objectives.</p> <p>Provides a detailed plan for coordination and collaboration with other IDEA mandated activities projects funded by the MDE, OSE.</p>	<p>The proposal:</p> <p>Provides a plan for establishing and supporting collaboration and communication networks with some stakeholders and partners and some communication, coordination and collaboration with the MDE, OSE.</p> <p>The plan lacks specificity in some areas and does not include the full range of stakeholders and partners important to complete the goals and objectives.</p> <p>Provides a plan for coordination with some of the other IDEA mandated activities projects funded by the MDE, OSE.</p>	<p>The proposal:</p> <p>Either provides no plan for supporting collaboration, communication, and coordination or the one described provides little or no evidence that the applicant is capable of establishing the relationships necessary for the successful implementation.</p>

Organization Capacity and Human Resources 3b - 10 Points Maximum		
Description	Independent Rating	Score
<p>The applicant must show the ability to collaborate and communicate with the MDE, OSE, other IDEA mandated activities projects, and special education stakeholders and partners. This includes:</p> <ul style="list-style-type: none"> • Provides a detailed plan for establishing and supporting collaboration and communication networks with appropriate stakeholders and partners; and supporting collaboration, communication, and coordination with the MDE, OSE. • Provides a detailed plan for coordination and collaboration with other IDEA mandated activities projects funded by the MDE, OSE. 	0 5 10	
Comments:		
Section Total: _____		

D. Evaluation

The applicant describes the methods that will be undertaken to collect data related to project outcomes and deliverables and the analysis of the data for project improvement and reporting.

This section is worth a maximum of **10 points**.

Exemplary	Moderate	Low
<p>The proposal:</p> <p>Provides ample evidence of the adequacy of procedures for obtaining feedback on the goals, objectives and ensuring continuous improvement in the operation of the proposed project.</p> <p>Provides a detailed statement that describes how the applicant will collect and analyze data related to the completion of the project and achievement of goals and objectives demonstrating effective outcomes.</p>	<p>The proposal:</p> <p>Provides evidence of the adequacy of procedures for obtaining feedback on the goals, objectives, and ensuring continuous improvement in the operation of the proposed project.</p> <p>Provides a generalized information describing how the applicant will collect and analyze data related to the completion of the project and achievement of goals and objectives.</p>	<p>The proposal:</p> <p>Provides little or no evaluation plan.</p> <p>Provides little or no information on data collection and analysis.</p>

Evaluation 10 Points Maximum		
Description	Independent Rating	Score
The proposal details the adequacy of procedures for obtaining feedback on the goals, objectives, and ensuring continuous improvement in the operation of the proposed project.	0 3 5	
The proposal provides clear documentation that describes how the applicant will collect and analyze data as part of the project evaluation plan and demonstrate effective outcomes.	0 3 5	
Comments:		
Section Total: _____		

E. Project Budget

The costs proposed are correctly associated and consistent with the activities proposed as well as the potential value of the outcomes. The applicant is able to describe their capacity to manage the budget.

This section is worth a maximum of **10 points**.

Exemplary	Moderate	Low
<p>The proposal:</p> <p>Demonstrates substantial and clear linkages among specific budget items, project activities and objectives.</p> <p>Includes a budget form with line items that is complete and accurate. The budget narrative explains in substantial detail with accurate and pertinent information for each line item in which funds are allocated.</p>	<p>The proposal:</p> <p>Has moderate linkages among specific budget items; project activities and objectives.</p> <p>Includes a budget form with line items that are complete and accurate and the budget narrative explains in some detail each line item for which funds are allocated.</p>	<p>The proposal:</p> <p>Has little or no clear linkage from budget to project activities and objectives.</p> <p>Includes a budget form with line items that are incomplete, inaccurate, or not included and the budget narrative is unclear in how funds will be used or is not included.</p>

Project Budget 10 Points Maximum		
Description	Independent Rating	Score
The budget demonstrates substantial and clear linkages among specific budget items, project activities and objectives.	0 3 5	
The budget form with line items is complete and accurate. The budget narrative explains in substantial detail with accurate and pertinent information for each line item in which funds are allocated.	0 3 5	
Comments:		
Section Total: _____		

Proposal Total		
Section	Maximum	Score
Statement of Need	15	
Management Summary and Work Plan	40	
Organization Capacity and Human Resources	25	
Evaluation	10	
Project Budget	10	
Comments:		
Proposal Total: _____		

Equipment
Education Division General Administrative Regulations
(EDGAR) – Appendix B (Page 22575)

The following is provided as guidance to budgeting, managing, and disposing of equipment acquired with IDEA grants funds and equipment records retention.

Budgeting – All equipment must be budgeted as capital outlay. The definition for capital outlay is found in Bulletin 1022 – Financial Accounting for Michigan School Districts.

Equipment is defined as tangible personal property having a useful life of more than one year and an acquisition cost of \$5,000 or more per unit. (EDGAR 74.132)

Use of Equipment – When equipment is no longer needed for the original project or program, the recipient shall use the equipment, if needed, in other U.S. Department of Education projects and then in other federally funded programs, or may voluntarily make the equipment available for use on projects or programs sponsored by the Federal Government which are conducted or supported by the grantee (EDGAR 74.137). Equipment purchased with mandated activities funds shall be transferred to a continuation project or an existing project with similar objectives when this grant has terminated.

Disposition – When original or replacement equipment is no longer to be used in projects or programs currently or previously sponsored by the Federal Government, disposition of the equipment shall be made as follows:

1. Equipment with a unit acquisition cost of less than \$5,000 may be retained, sold, or otherwise disposed of, with no further obligation of the Federal Government.
2. All other equipment may be retained or sold, and the Federal Government shall have a right to an amount calculated by multiplying the current market value or the proceeds from the sale, by the Federal share of the equipment. One hundred dollars or ten percent of the total sales proceeds, whichever is greater, may be retained. (EDGAR 74.139)

Management –

1. Property records must be maintained accurately with complete descriptions and history. (EDGAR 74.140)
2. Physical inventory at least once every two years. (EDGAR 74.140)
3. Security controls. (EDGAR 74.140)
4. Maintenance. (EDGAR 74.140)
5. Where the Federal Government has a right to part or all of the proceeds of the sale of equipment, selling procedures shall provide for competition to the extent practicable and result in the highest possible return. (EDGAR 74.140)

Equipment Records Retention Period – Retention period of five years for equipment records begins on date of equipment's disposition, replacement, or transfer. (EDGAR 74.22)

Budget: Mandated Activities Funds for Training and Technical Assistance for Family Involvement

IDEA, Part B, Section 611

Budget Category	Budget Detail	Estimated Budget Amount
Project's Estimated Costs:		
Salaries (List Grant Personnel & FTE): Director Professional Staff Technical Staff Clerical Staff Other	Approximately ___ FTE	\$
Employee Benefits (List out for each employee):		\$
Purchased Services: Travel (Grant Employees) In State Out of State Contracted Services (Personnel & Entities) Conferences/Workshops Printing/Copying Postage Stipends, Fees, Honorariums		\$
Supplies and Materials: Office Supplies		\$
Sub-Total:		\$
Below the line costs:		
Indirect Costs		\$
Audit		
Capital Outlay (Equipment purchases over \$5,000)		
Operations and Maintenance: Rent Additional Operating Expenses		
Grand Total (Not to exceed \$1,150,000)		\$
Other Revenue		
In-kind Contribution		

Budget: Mandated Activities Funds for Training and Technical Assistance for Family Involvement

IDEA, Part C

Budget Category	Budget Detail	Estimated Budget Amount
Project's Estimated Costs:		
Salaries (List Grant Personnel & FTE): Director Professional Staff Technical Staff Clerical Staff Other	Approximately ___ FTE	\$
Employee Benefits (List out for each employee):		\$
Purchased Services: Travel (Grant Employees) In State Out of State Contracted Services (Personnel & Entities) Conferences/Workshops Printing/Copying Postage Stipends, Fees, Honorariums		\$
Supplies and Materials: Office Supplies		\$
Sub-Total:		\$
Below the line costs:		
Indirect Costs		\$
Audit		
Capital Outlay (Equipment purchases over \$5,000)		
Operations and Maintenance: Rent Additional Operating Expenses		
Grand Total (Not to exceed \$93,000)		\$
Other Revenue		
In-kind Contribution		

Instructions for completion:

Bidders who are submitting a proposal for the grant should complete the above draft budget demonstrating estimated costs for services outlined within the RFP.

Budget Narrative: Provide a detailed budget narrative for each function code listed. Though no Object Codes are provided in the given budget, you would assign those as appropriate per the Michigan School Accounting Manual.

- **Salaries** – give the title of each position, a description of their role and the FTE of that position.
- **Employee Benefits** - list out the benefits being provided for each employee.
- **Purchased Services**
 - Travel Expense – provide a description of each type of travel to be supported with project funds for employees of the grant such as training events, conferences, regional meetings and workshops. List the positions that will attend, not the name of individuals. These expenditures for grant employees may include but are not limited to overnight accommodations, registration fees, mileage, and meals.
 - Contracted Service - provide the name of the person or entity and a detailed description of the service/product to be provided. Costs assigned to this item should include all expenses affiliated with outcome. If there is planning time, travel, or overnight accommodations needed for an individual contracted for this project these expenses should be reflected here.
 - Conferences/workshops – provide a list of expenditures incurred by the grant to host a statewide, regional or local conference or workshop. Have expenses detailed as possible, such as facility cost, speaker cost, meals provided to attendees, etc.
 - Printing/Copying - describe what materials are being produced under this area, brochures, training materials, booklets, etc.
 - Postage
 - Stipends, Fees, Honorariums - provide the type of activity and expenses incurred within this area for referent group, regional team meeting, advisory panel, etc. List number of persons receiving funds for their participation in activity.
- **Supplies and Materials** – this includes consumable items and equipment under \$5,000 that are directly related to the purpose of the project.
 - Office Supplies – pens, books, paper, etc.
 - Equipment under \$5,000 (example: printer)
- **Indirect Costs** – this rate is based on expenses that are not directly charged to the grant. Federal restricted indirect cost rates are sent to school districts yearly and will be the rate used if the fiscal agent is a school district. The MDE's policy states universities, colleges, and other organizations are limited to an 8% rate.
- **Audit Costs** – grantees that have been awarded an allocation of \$500,000 or more are required to have the project audited yearly. This cost may be charged to the grant.

- **Direct Operation and Maintenance** – list out expenditures for operational functions associated directly with the grant.
 - Rent
 - Repairs and Maintenance
- **Capital Outlay Equipment** – equipment purchased for the grant that exceeds \$5,000 must have department approval before purchase is made. List out all capital outlay equipment items.