



**Request for Proposals
NC's Pathway to Grade-Level Reading**

TITLE: Design Teams Project Manager for NCECF's Pathways to Grade-Level Reading Initiative

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ISSUING AGENCY: NC Early Childhood Foundation

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For consideration, proposals must be emailed to mableidinger@buildthefoundation.org by **February 10, 2017 at 5 PM EST**.

INTRODUCTION

The vision of the North Carolina Early Childhood Foundation (NCECF) is that each North Carolina child has a strong foundation for lifelong success and reading proficiency, supported by the nation's best birth-to-eight system.

To drive policies and strategies that unleash the potential of each North Carolina child, the North Carolina Early Childhood Foundation brings together those working to promote children's health and development, to support families and communities and to advance high quality birth-to-eight learning.

Our work includes:

- Promoting public understanding of and support for policies that promote children's birth-to-eight years for academic and lifelong success.
- Convening and spearheading collaboration to bridge North Carolina's birth-to-five and kindergarten-to-third grade systems.
- Advancing policies that create a stronger NC today and tomorrow by supporting each child's birth-to-eight development.

The purpose of the Request for Proposals (RFP) is to acquire the services of a qualified contractor to manage the Pathways to Grade-Level Reading Initiative Design Team process.

The NC Pathways to Grade-Level Reading (Pathways) initiative is creating partnerships among the state's early learning and education, public agency, policy, philanthropic and business leaders to define a common vision, shared measures of success and coordinated strategies that support children's optimal development beginning at birth.

Pathways is powered by the NC Early Childhood Foundation (NCECF) in collaboration with NC Child, The North Carolina Partnership for Children, Inc., and BEST NC.

PATHWAYS BACKGROUND

- A [group of stakeholders met in March 2015](#) and determined that there was need for a collective process to agree on a common vision around improving third grade reading proficiency, shared measures of success that were whole-child, and aligned action to move the needle on those measures of success and our top line result of getting all children reading on grade level by the

end of third grade.

- Phase I of the Pathways work was a [Data Action Team](#) of 30 data experts from the three goal areas (Health, Family/Community and Education) that considered the research and created a [framework of whole child measures](#) that are critical for improving early literacy.
- Phase II, [Learning Teams](#), looked at the NC data around those measures, considered questions of need – how is NC as a whole doing on the measures – and equity – how are subgroups of children doing – and chose 12 measures that rose to the top as particularly important. The Learning Teams [finished their work in December](#) by highlighting an even smaller group of measures that are their recommendations for where to start moving to action first.
- The larger group of stakeholders has met twice during the process and has been engaged electronically throughout. They will meet again on March 10th where they will hear the Learning Teams' recommendations and consider momentum – what is already happening in NC around these key measures – and kick off Phase III of the work – Design Teams.
- Three Design Teams will each take a prioritized measure or a small bundle of measures and create policies, practices and capacities agendas for those measures. What needs to change in NC to improve outcomes on those measures?

For more background on the Pathways initiative to-date, please visit <http://www.buildthefoundation.org/pathways>

SCOPE OF WORK

NCECF seeks to hire a consultant to project manage the Pathways to Grade-Level Reading Initiative Design Team process (see attached *Design Teams Description and Scope of Work*), including:

Overview: Consultant will manage three Design Teams through a one-year process, with each Design Team meeting quarterly. We estimate each Design Team meeting will be 4 hours.

Meeting Planning and Logistics

- Working by phone with national systems consultant Pennie Foster-Fishman and NCECF staff to plan the process for each meeting to move the Design Teams towards their goal of creating policies, practices and capacities agendas for the prioritized Measures of Success.
- Working with NCECF Organizational Manager to plan meeting logistics including location, room set-up, printing of materials and supplies, and refreshments.
- Working with NCECF staff and Pennie Foster-Fishman to plan logistics and content for 1-2 larger Stakeholder group meetings (100-150 participants) over the course of the year.
- Attending Design Team meetings to coordinate logistics and support NCECF staff as needed, including such tasks as helping with the meeting process, facilitating groups, and taking notes.

Communication

- Drafting relevant communications with the Design Team members, including meeting reminders and follow-ups.
- Facilitating a feedback loop between the Design Teams and the Community Conversations (see *Design Team Description*) by synthesizing and incorporating feedback from the Community Conversations into the Design Team meetings and synthesizing Design Team recommendations

for incorporation into Community Conversations.

Materials Preparation and Meeting Follow-up

- Compiling and preparing materials for the Design Team meetings. *Large research pieces used by the Design Teams (including compendium of research-based policies, policy matrix, and existing strategic plans) will already be created by NCECF staff and consultants.*
- Synthesizing work done during each meeting and preparing a meeting summary.
- Conducting follow-up after meetings with Design Team members, including follow-up surveys for evaluation, and reminders of “homework” and next steps.
- Pulling together research or other information needed by Team members between meetings. *We encourage designing the process so that most of this information- and research-gathering is done by the Design Team members themselves, rather than by the consultant.*
- Compiling final set of agendas for each Design Team.

DELIVERABLES

- A detailed work plan and timeline, including at minimum a weekly call with NCECF.
- All materials needed to implement the work of the Design Teams, including PowerPoint presentations, internal and external agendas, data, materials for meeting activities, etc.
- Written meeting summaries to be shared with the Design Team and publicly after each Design Team meeting.
- Brief surveys to be disseminated after each Design Team meeting to evaluate process and progress.
- Brief written summaries of survey responses for NCECF staff.
- A written report for a public audience summarizing the outcome of the Design Team work, including an overview of the process, list of attendees and the recommended policies, practices and capacities selected.

TIMELINE (February 2017-May 2018)

- February/March 2017: Attend March 10th Pathways to Grade-Level Reading Stakeholder Meeting to begin learning the work. Work with NCECF staff and Pennie Foster-Fishman to begin planning the Design Team meeting process, which will start in May 2017.
- May/June 2017: Meeting 1 for each of the three Design Teams, including prep and follow-up
- August/September 2017: Meeting 2 for each Design Team, including prep and follow-up
- November/December 2017: Meeting 3 for each Design Team, including prep and follow-up
- February/March 2018: Meeting 4 for each of Design Team, including prep and follow-up

One to two other stakeholder meetings will be held over the course of the year as well, timing TBD. The project will be completed by May 1, 2018.

QUALIFICATIONS

The Contractor must have demonstrated competency in performing services defined in the Scope of Work Section of this RFP. Contractor should provide the name, address, and telephone number for a reference for three projects completed in the last year.

The Contractor must provide details of any pertinent judgment, criminal conviction, investigation or litigation pending against the Contractor or any of its officers, directors, employees, agents or subcontractors of which the vendor has knowledge, or a statement that there is none. NCECF reserves the right to reject a proposal based on this information.

PROPOSAL REQUIREMENTS

The response to this RFP shall consist of the following sections:

- Cover Letter
- Background and Experience of Contractor
- Project Staffing and Organization
- Technical Approach and Project Timeline
- Cost Proposal

1. Cover Letter

Each proposal must include a cover letter, signed and dated by an individual authorized to legally bind the Contractor. The cover letter must contain a statement that the person signing the proposal is a legal representative of the Contractor and is authorized to bind the Contract.

2. Background and Experience of Contractor

This section shall include background information on the organization and should give details of experience with similar projects. A list of three references (including contact persons, addresses and telephone numbers) for whom similar work has been performed shall be included.

Submit verification of the Contractor's Federal Taxpayer Identification Number (TIN), preferably a copy of the IRS letter assigning the federal tax identification number or a letter signed by an official on agency letterhead indicating the federal tax identification number and the Contractor's legal name.

3. Project Organization

This section must include the proposed staffing, deployment and organization of personnel to be assigned to this project.

The Contractor shall provide information as to the qualifications and experience of all executive, managerial, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person. Include the names, titles, roles and time commitment of personnel that will be assigned to this project.

4. Technical Approach and Project Timeline

This section shall include the Contractor's approach to accomplishing the scope of work outlined in the RFP, including (but not limited to) an outline of the proposed approach, a process for board, staff, and partner engagement, and a description of the components of the final plan. A description of each task and deliverable and the timeline for accomplishing each shall be included.

5. Cost Proposal

Cost competitiveness will be a factor considered in the bid selection process. The cost proposal shall contain:

- Personnel Costs (including hourly rates and total hours for each individual/position)
- Travel and Subsistence Expenses
- Other Costs (e.g., office expenses)
- TOTAL COST: A total not-to-exceed cost representing the maximum amount for all work to be performed must be clearly indicated.

Pathways to Grade-Level Reading Initiative Design Teams Description and Scope of Work

The Pathways to Grade-Level Reading Initiative's vision is bold – all North Carolina children, regardless of race, ethnicity or socioeconomic status, are reading on grade-level by the end of third grade, so that they have the greatest opportunity for life success.

Achieving this vision will take long-term commitment. To get there, we need state and local policies and practices aligned around and actively advancing this common vision, shared measures of success and coordinated strategies that support children's optimal development beginning at birth. To accomplish that, Pathways is creating partnerships among the state's public agency, policy, philanthropic, business and birth-to-third grade leaders.

Design Teams will be Phase III of the Pathways work.

The Work So Far:

Phase I identified shared, whole-child [Measures of Success](#) that put children on a pathway to grade-level reading. The Measures of Success are based on the research on what factors move the needle on third grade reading proficiency. The measures are whole-child, beginning at birth, and focus on:

- Health and Development on Track, Beginning at Birth,
- Supported and Supportive Families and Communities,
- High Quality Birth-to-Eight Early Care and Learning Environments, and
- Regular Attendance at Early Learning Programs and Schools.

The process to develop the Measures of Success Framework was undertaken by [a Data Action Team](#) composed of 30 experts from North Carolina's leading universities, research institutions, government agencies, businesses and think tanks, working in concert with Pathways stakeholders representing government agencies, nonprofit organizations, the private sector, foundations, research institutions and members of the General Assembly.

The North Carolina General Assembly recognized and named the NC Pathways to Grade-Level Reading Measures of Success in the 2016 budget when it passed provisions calling for greater coordination across birth-to-eight agencies and organizations.

Phase II of the initiative, Learning Teams, strove to answer the questions:

- How are North Carolina's children and families doing on the Pathways Measures of Success?
- Where should we start first to move to action?

Three Learning Teams, focused on Health, Families and Communities, and Education, worked from August to December to analyze the trends, inequities, patterns and connections in the North Carolina data and identify data gaps. They used this information to select 12 measures from the Measures of Success Framework that showed high need in North Carolina and high disparities (primarily by race/ethnicity and/or income), and that had a big impact on the other measures in the framework. The 12 measures selected by the three Learning Teams included:

Health and Development on Track, Beginning at Birth	Supported and Supportive Families and Communities	High Quality Birth to Eight Early Care and Learning Environments
<ul style="list-style-type: none"> • Healthy Birthweight • Development (early interventions) • Physical Health • Social-Emotional Health 	<ul style="list-style-type: none"> • Safe at Home (No Child Maltreatment) • Positive Parent and Child Interactions • Social Supports for Families • Reading with Children 	<ul style="list-style-type: none"> • High Quality Birth to Eight Care and Education • Summer Learning • Promotion to Next Grade • Regular Attendance

The three Learning Teams then came together to collectively propose a smaller set of priorities to move to action on first, including:

- **Healthy Birthweight** to provide a good start in life for every child. **Development (early interventions)** and **Social Supports for Parents**, in order to ensure **Positive Parent and Child Interactions**, which support children’s **Social-Emotional Health**. Access to **High Quality Birth to Eight Early Care and Education** ensures that children have excellent early care and education environments and **Regular Attendance at Programs and Schools** ensures that they benefit from them.

The Learning Teams stressed the importance of the living conditions that support children’s healthy growth and development, including family economic security, safe and economically viable neighborhoods, environmental health, housing stability, trauma-informed communities, and racial equity. They urged the Design Teams to identify strategies that are focused on moving the needle on the prioritized measures, and that also help address these living conditions.

Design Teams Purpose:

The purpose of the Design Teams will be to create policies, procedures and capacities agendas to advance the prioritized measures of success in North Carolina. What needs to change in our state to see shifts in the prioritized measures of success? Policies, procedures and capacities are defined as follows:

- Policies: Federal, State Legislative, State Departmental, and local policies.
- Procedures: Protocols in place to implement the policies, some of which might be driving good outcomes, and some of which might be obstacles to improving outcomes.
- Capacities: Provider capacity, parent capacity, public understanding and will-building, and array of quality programs to improve the indicator(s).

Policies, procedures and capacities agendas will serve as Pathways’ platform for progress on grade-level reading. Pathways will work to implement the recommendations through the state’s public, nonprofit and private sectors as appropriate and will seek the creation of a birth-to-eight grade-level reading task force.

Design Teams Timeline:

We anticipate three Design Teams, which will each meet quarterly for one year on the following schedule:

- May-June 2017: Design Teams Meeting 1
- August-September 2017: Design Teams Meeting 2
- November-December 2018: Design Teams Meeting 3
- February-March 2018: Design Teams Meeting 4

Design Teams Scope of Work:

Each of the three Design Teams will have resources relevant to their Team’s prioritized Measures of Success, including but not limited to:

- Current NC data on the measures, as available.
- A policy matrix cross-referencing birth-to-eight policies, procedures and capacities recommended by national researchers and advocacy organizations.
- A brief compendium of evidence-based policies, procedures and capacities for each of the prioritized measures of success, which will include why the indicator is relevant for third-grade reading, relevant policies, procedures and capacities that have been proven to impact the measure, and strategy examples from NC and other places that have successfully impacted the measure.
- Feedback from Community Conversations that will be held around the state with early childhood providers, local leaders, and families. Community members will be asked what state-level policies, procedures and capacities support, get in the way of, or are needed for them to be able to make improvements locally on the prioritized Measures of Success.
- Existing strategic plans or action plans on the prioritized Measures of Success that would be relevant to the Design Teams' work.

Design Teams will be professionally facilitated through a process to create policies, procedures and capacities agendas for their Measures of Success.

Design Team Member Characteristics:

Pathways is designed to address racial inequities through disaggregation of data and intentionally choosing strategies to reduce disparities. We are committed to engaging the diversity of North Carolina's people, especially the voices of people of color.

Design Team members should:

- Have already undertaken work in North Carolina on the prioritized measures of success;
- Understand the challenges around the prioritized measures of success on the state and local levels; and/or
- Be in a position to implement the strategies recommended by the Design Team.

Overarching characteristics for Design Team members include:

- A commitment to being data- and research-driven.
- A willingness to engage people with different policy perspectives with an open mind.
- An ability to look at early literacy development through a multi-dimensional systems lens and an understanding of how early literacy is impacted by a child's developmental trajectory, within the context of his or her family and community.
- An understanding of the impact of adverse childhood experiences (ACEs) on child development and reading proficiency.
- A commitment to acknowledging and eliminating systemic inequities and racial, ethnic and socioeconomic disparities in early childhood experiences, opportunities and outcomes.
- An eagerness to think outside the box of what the state currently does and imagine the possibilities.
- A commitment to action, and to finding a good – even if imperfect – starting place for the work.

Design Teams should include representatives from the following categories of stakeholders:

- **Early childhood policy experts and advocates outside of state government** who think on a systems-level, understand the multi-dimensional aspect of child development and early literacy development, know North Carolina's early childhood history, and are eager to build on that knowledge to move the state forward.

- **Early childhood policy experts inside state government agencies** who understand the big picture and are committed to “getting to yes.” These leaders will be asked to help the group better understand the constraints and limitations the state struggles with and play an inside role in carrying the work forward beyond the Design Team phase and into implementation.
- **Early childhood implementers** at the state, county and/or community level who are able to look at the work to improve early literacy through a systems lens. They will be asked to share their experiences with implementing early childhood policy and to highlight both the policies that support their work and those that can get in the way of improving outcomes for children and families.
- **Families representatives** who will use their experiences to help identify what obstacles families face in ensuring early school success for their children, and which policies work for families and which do not.
- **Funders in the early childhood space** who would like to see the birth-to-eight community in North Carolina align around a common goal, shared measures of success and coordinated strategies for taking action on early childhood investments, and who can bring their experiences from working across the state in diverse communities to bear on the Design Team work.
- **Business leaders** who understand the critical importance of the early years and can serve as ambassadors for the work and key influencers with policymakers and other leaders.

Expectations:

Design Team members will be asked to commit to:

- Attend four Design Team meetings and one statewide Summit between May 2017 and April 2018;
- Conduct work between Design Team meetings, including gathering information about policies, practices, capacities, and data, as needed by the Team; and
- Participate on Design Team workgroups if/as needed.