Purchasing and Contract Services

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REQUEST FOR QUOTES (RFQ) #2014-14
Issue Date: May 28, 2014

Project Name:	South Metro-Salem STEM Hub Data Collection and Evaluation		
BID Due Date/Time:	June 18, 2014, 1:00 PM		
Project Coordinator:	Melissa Dubois	Phone:	503-821-1169
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Contract Coordinator:	George Marlton	Phone:	503-821-1277
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SUBMIT QUOTES VIA EMAIL TO PURCHASING@OIT.EDU OR MAIL/HAND DELIVERY TO THE ABOVE WILSONVILLE ADDRESS TO GEORGE MARLTON

**PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE
"RFQ #2014-14" IN THE SUBJECT LINE**

1. **ANNOUNCEMENT AND SPECIAL INFORMATION**

   Quoters are required to read and understand and comply with all information contained within this RFQ. All quotes are binding upon Quoter for thirty (30) days from the RFQ Due Date/Time. All payments for services will be paid in accordance to OAR 580-061-0050. Quotes received after the RFQ Due Date/Time may not be considered. Travel and other expense reimbursement will only be reimbursed in accordance with the OIT Contractor's Travel Reimbursement Policy at the time the expense is incurred.

   It will be the responsibility of potential Quoters to refer daily to the OUS Procurement Gateway website (https://secure.ous.edu/bid/) to check for any available addenda, response to clarifying questions, cancellations or other information pertaining to this Request for Quotes.

2. **SCOPE**

   The purpose of this RFQ is to acquire the services of a professional evaluation firm that will evaluate the South Metro-Salem STEM Hub three functional areas:
   - Data Collection and Analysis for Macro-Goals
   - Current Shared Measures of Success Related to Three Strategies
   - STEM Partnership/Hub Evaluation

   See attached Exhibit A - Scope of Work for Program Evaluation

   The project has a maximum budget of $60,000 for the evaluation. By providing the maximum budget amount, Oregon Tech does not intend for firms to propose at that fixed amount but instead to provide a professional competitive proposal. Firms may subcontract a portion of the work, if appropriate. If any portion is subcontracted, information on the subcontractor must be included in the Quote.

3. Quote

Quotes should be <u>short and concise (8 pages maximum)</u> with the following information:

    A. Company experience in these types of projects;
    B. Identify key staff that would be assigned to the project and provide describe experience in similar projects;
    C. Provide a fee on a time and material basis with a not-to-exceed for the project. Note to provide the training fee as an optional service. Total fee should still fit within the above referenced budget;
    D. Provide 3 client references for similar projects (include email and phone number);
    E. Methodology for conducting all facets of the data collection and evaluation, including estimated time to complete the project; and
    F. Any additional information that Oregon Tech should take into consideration for the project or qualifications.

4. Evaluation

Quotes will be evaluated based on subjective factors including, but not limited to: Company experience, staff experience, not-to-exceed price for the project, references, and methodology and proposal to complete the project (including timeline).

OREGON INSTITUTE OF TECHNOLOGY
CERTIFICATIONS
RFQ #2014-14

Each Quoter must read, complete and submit a copy of this Oregon Institute of Technology Certification with their Quote. Failure to do so may result in rejection of Quote. By signature on this Certification the undersigned certifies that they are authorized to act on behalf of the Quoter and that under penalty of perjury the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS
As required in ORS 305.385(6) the undersigned hereby certifies that to the best of the undersigned's knowledge, the Entity is not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 401.792 to 401.816 and ORS chapters 118, 314, 316, 317, 318, 320, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and local taxes administered by the Department of Revenue under ORS 305.620. If a Contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Contractor to 31% backup withholding.

SECTION II. AFFIRMATIVE ACTION
The undersigned hereby certifies that they have not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts, pursuant to OAR 580-061-0030(3).

SECTION III. COMPLIANCE WITH SOLICITATION
The undersigned further agrees and certifies that they:
1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFQ (including any attachments); and
2. Are an authorized representative of the Quoter, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Quote or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFQ and Quote.

Firm Name:_____   Date:_____

Signature:_____   Title:_____

Name (Type or Print):_____   Telephone:_____

Email:_____   OR CCB # (if applicable):_____

Business Designation (check one):

☐ Corporation ☐ Partnership ☐ Sole Proprietorship ☐ Non-Profit ☐ Limited Liability Company

Oregon Certified Minority, Women, or Emerging Small Business: (Mark if applicable and certification #)

☐ Minority:_____   ☐ Women:_____   ☐ ESB:_____

Self-Reported Minority, Women, or Emerging Small Business: (Mark if applicable)

☐ Minority:_____   ☐ Women:_____   ☐ ESB:_____

OREGON INSTITUTE OF TECHNOLOGY
INSTRUCTIONS TO QUOTERS

Quotes are subject to the applicable provisions and requirements of the Oregon Administrative Rules and Oregon Revised Statutes.

QUOTE PREPARATION

1. **QUOTE FORMAT**: Quotes must be must be submitted as indicated in the RFQ. Quotes may be submitted in writing to OIT office via e-mail, mail or in person.
2. **CONFORMANCE TO RFQ REQUIREMENTS**: Quotes must conform to the requirements of the RFQ. Unless otherwise specified, all items quoted are to be new, unused and not remanufactured in any way. Any requested attachments must be submitted with the quote and in the required format. Quote prices must be for the unit indicated on the quote. Failure to comply with all requirements may result in quote rejection.
3. **ADDENDA**: Only documents issued as addenda by OIT serve to change the RFQ in any way. No other directions received by the Quoter, written or verbal, serve to change the RFQ document. NOTE: IF YOU HAVE RECEIVED A COPY OF THE RFQ, YOU SHOULD CONSULT THE UNIVERSITY PROCUREMENT GATEWAY WEBSITE (https://secure.ous.edu/bid/) TO ENSURE THAT YOU HAVE NOT MISSED ANY ADDENDA OR ANNOUNCEMENTS. QUOTERS ARE NOT REQUIRED TO RETURN ADDENDUMS WITH THEIR QUOTE. HOWEVER, QUOTERS ARE RESPONSIBLE TO MAKE THEMSELVES AWARE OF, OBTAIN AND INCORPORATE ANY CHANGES MADE IN ANY ADDENDUMS ISSUED, AND TO INCORPORATE ANY CHANGES MADE BY ADDENDUM INTO THEIR FINAL QUOTE. FAILURE TO DO SO MAY, IN EFFECT, MAKE THE QUOTER'S QUOTE NON-RESPONSIVE, WHICH MAY CAUSE THE QUOTE TO BE REJECTED.
4. **USE of BRAND or TRADE NAMES**: Any brand or trade names used by OIT in RFQ specifications are for the purpose of describing and establishing the standard of quality, performance and characteristics desired and are not intended to limit or restrict competition. Quoters may submit quotes for substantially equivalent products to those designated unless the RFQ provides that a specific brand is necessary because of compatibility requirements, etc. All such brand substitutions shall be subject to approval by OIT.
5. **PRODUCT IDENTIFICATION**: Quoters must clearly identify all products quoted. Brand name and model or number must be shown. OIT reserves the right to reject any quote when the product information submitted with the quote is incomplete.
6. *FOB DESTINATION*: Unless specifically allowed in the RFQ, *QUOTE PRICE MUST BE F.O.B. DESTINATION with all transportation and handling charges paid by the Quoter.*
7. **DELIVERY**: Delivery time must be shown in number of calendar days after receipt of purchase order.
8. **EXCEPTIONS**: Any deviation from quote specifications, or the Oregon Institute of Technology Professional Services Contract may result in quote rejection.
9. **SIGNATURE ON QUOTE**: Quotes must be signed by an authorized representative of the Quoter. Signature on a quote certifies that the quote is made without connection with any person, firm or corporation making a quote for the same goods and/or services and is in all respects fair and without collusion or fraud. Signature on a quote also certifies that the Quoter has read and fully understands all quote specifications, and the Oregon Institute of Technology Professional Services Contract (including insurance requirements). No consideration will be given to any claim resulting from quoting without comprehending all requirements of the RFQ.
10. **QUOTE MODIFICATION**: Quotes, once submitted, may be modified in writing before the time and date set for quote closing. Any modifications should be signed by an authorized representative, and state that the new document supersedes or modifies the prior quote. Quoters may not modify quotes after quote closing time.
11. **QUOTE WITHDRAWALS**: Quotes may be withdrawn by request in writing signed by an authorized representative and received by OIT prior to quote closing time. Quotes may also be withdrawn in person before quote closing time upon presentation of appropriate identification.

12. **QUOTE SUBMISSION**: Quotes may be submitted by returning to OIT Purchasing and Contract Services Office in the location designated in the introduction of the RFQ via e-mail, mail or in person but no oral or telephone quotes will be accepted. Envelopes, or e-mails containing Quotes should contain the RFQ Number and RFQ Title.

QUOTE EVALUATION AND AWARD

1. **PRIOR ACCEPTANCE OF DEFECTIVE PROPOSALS**: Due to limited resources, OIT generally will not completely review or analyze quotes which fail to comply with the requirements of the RFQ or which clearly are not the best quotes, nor will OIT generally investigate the references or qualifications of those who submit such quotes. Therefore, neither the return of a quote, nor acknowledgment that the selection is complete shall operate as a representation by OIT that an unsuccessful quote was complete, sufficient, or lawful in any respect.

2. **DELIVERY**: Significant delays in delivery may be considered in determining award if early delivery is required.

3. **CASH DISCOUNTS**: Cash discounts will not be considered for award purposes unless stated in the RFQ.

4. **PAYMENT**: Quotes which require payment in less than 30 days after receipt of invoice or delivery of goods, whichever is later, may be rejected.

5. **INVESTIGATION OF REFERENCES**: OIT reserves the right to investigate references and or the past performance of any Quoter with respect to its successful performance of similar services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, sub-contractors, and workers. OIT may postpone the award or execution of the contract after the announcement of the apparent successful Quoter in order to complete its investigation. OIT reserves the right to reject any quote or to reject all quotes at any time prior to OIT's execution of a contract if it is determined to be in the best interest of OIT to do so.

6. **METHOD OF AWARD**: OIT reserves the right to make the award by item, groups of items or entire quote, whichever is in the best interest of OIT.

7. **QUOTE REJECTION**: OIT reserves the right to reject any and all quotes.

8. **QUOTE RESULTS**: Quoters who submit a quote will be notified of the RFQ results. Awarded quote files are public records and available for review by appointment.

Exhibit A
Oregon Tech and South Metro-Salem STEM Hub
Scope of Work for Program Evaluation
Draft: April 15, 2014

The South Metro-Salem (SMS) STEM Partnership has been selected to be a STEM Hub by the State of Oregon. Each of the state's six designated Hubs have proposed a unique theory of change related to expanding STEM education in Oregon. The SMS Hub, under the direction of Oregon Tech, has established a vision, mission, goals and strategies. The SMS Hub is seeking professional evaluation services to develop an appropriate measurement system for its Hub organization and its three core strategies so that it can report to the state by June 2015, and in subsequent years, about the effectiveness of its theory of change. Further, these data will support the development of future grants to external agencies, demonstrating initial impact of partnership activities. The evaluator will help to recommend changes to data fields, finalize common measures, collect and analyze data, and conduct a first-year evaluation.

This evaluation contract has several parts:

1. Data Collection and Analysis for Macro-Goals:
    The SMS STEM Partnership intends to collect baseline data from its 15 public school districts related to current and future student performance measures. SMSP would also like to train districts on data collection and reporting, if possible.

    Macro-level Goals:
    -   By 2025, increase the percentage of the region's 4th, 8th, and 12th graders that are "proficient" and "advanced" in math as measured by the Smarter Balanced assessment.
    -   By 2025, increase the number of STEM college graduates that matriculate from partner district schools.
    -   Increase STEM participation, persistence in STEM academic pursuits, and achievement based on ethnic/cultural and/or socioeconomic background, limited English language proficiency, gender, or disability.

    Deliverables:
    1. Collect required baseline data
    2. Propose additional/alternate data to support macro-level goals.
    3. Conduct training to the 15 districts on the data collection and reporting process.
        Note: Price training fee as an optional service.

2. Current Shared Measures of Success Related to Three Strategies:
    The SMS STEM Partnership has developed Measures of Success for school districts and post-secondary partners, as well as the STEM Network. The current Measures of Success need to be revised so that they can be aggregated across the 15 districts, and captured from existing data systems. Many districts reported difficulty with this data collection, especially as it pertains to disaggregating by equity categories. The measures also need to be evaluated for whether they will effectively measure the performance tied to the core strategies, and support the partnership's competitiveness for federal and private foundation grants. SMSP would also like to train districts on data collection and reporting, if possible.

Deliverables:
1. Propose Revisions to the Measures of Success.
2. Evaluate the Measures to ensure they will effectively measure the performance tied to the core strategy, and support the partnership's competitiveness for federal and private foundation grants.
3. Conduct training to the 15 districts on the data collection and reporting process.
   Note: Price training fee as an optional service.

All shared measures will be tracked for all students, as well as with measures collected by socioeconomic factors including: economically disadvantaged, limited English proficient, students with disabilities, race/ethnicity, TAG, girls. Data will be available at the district and school level.

Measure	Grades				
	K-3	**4-5**	**6-8**	**9-10**	**11-12**
Number of hours per week in science instruction	X	X			
Percentage (%) of students taking STEM courses (includes Math, Science, Technology, and Engineering courses – stand alone or part of a STEM or CTE program leading to STEM related careers/occupations).			X	X	X
Percentage (%) of students taking advanced science courses (AP, IB, Honors, and dual credit courses)				X	X
Percentage (%) of students taking advanced math courses (AP, IB, Honors, and dual credit courses)				X	X
Number of students involved in STEM programs that are voluntary (i.e., before and after school programs such as Robotics)	X	X	X	X	X

3. <u>STEM Partnership/Hub Evaluation:</u>
   The SMS STEM Partnership is also seeking to ensure that it can answer the following questions, or similar evaluation questions, related to its theory of change; collect both qualitative and quantitative data during the 2014-2015 academic year; and provide an evaluation report by June 30, 2015. The proposed evaluation questions and logic model in the grant proposal are included below for consideration.

(E) Evaluation Plan. Logic Model. Please see Logic Model (below). The underlying assumption is that long term outcomes for student achievement will be attained:
1. when teachers can help students apply what they learn and when students understand and can use core STEM principles (as a result of STEM Learning Community),
2. community partners are fully engaged in connecting academics to application (as a result of the STEM NETwork), and
3. accelerated credit options encourage student STEM college-going rates (as a result of Accelerated Credit).

Evaluation Questions that support theory of change:
1. Has the formation of a STEM Hub increased dissemination of STEM practices, awareness of opportunities, and resources to support STEM learning for students and teachers in partner districts?

2. Has the development of a STEM learning community led to an increase in the number of teachers integrating the teaching of science, technology, engineering and math, incorporating contextualized learning in classrooms, and developing district STEM plans?
3. Have teachers and community partners utilized the STEM NETwork to extend contextualized STEM teaching and learning resources into classroom instruction or to extend the school day?
4. Have teachers and community partners utilized the STEM NETwork to extend contextualized STEM teaching and learning resources in alignment with the Common Core State Standards and NGSS?
5. Will expansion of accelerated credit outreach and increased STEM course offerings, and increased bonds to post-secondary partners result in an increased college-going rate for any/all demographic groups?

Data collection and methodologies. The SMS Partnership will work with a professional evaluator. Student data will be collected to the extent possible through existing databases, including ODE data and National Student Clearinghouse data. As the ODE develops a State Longitudinal Data System to include P-20W (preschool – work), the SMS Partnership will seek to use these data to match student K-12 and postsecondary achievement. For interim measures, SMS Partnership will use school district data. Districts will be surveyed regarding teacher participation and number of teachers who have changed practices. Postsecondary institutions will be surveyed regarding college-going incentives and dual/accelerated credits in STEM courses.

Measures, reliability and validity. Measures to assess impact include the Interim Measures and Shared Measures listed above. Interim measures are focused on impact on educators and the community while shared measures are focused on student impact. These measures were developed by education, business and community partners. The SMS Partnership will work with a professional evaluator to develop the formal evaluation and data collection methodologies, including qualitative, formative feedback (rubric-based assessments, interviews, surveys) to assure reliability and validity of data, and that the measures support the theory of change. The evaluation framework and hub performance measures will focus on access and success of under-served students in STEM courses and programs. Particular emphasis will be given to closing persistent achievement gaps and expanding college readiness programs for minority students so they are better prepared to enroll in STEM programs in college and succeed.

    Deliverables:
1. Propose/revise Evaluation Questions/measures that will demonstrate progress toward Partnership outcomes (related to the Theory of Change).
2. Collect appropriate partnership data during 2014-15 academic year
3. Produce a draft evaluation report by no later than June 12, 2015. After comment and feedback from Oregon Tech, the final draft must be completed by no later than June 29, 2015.

SMS STEM Partnership

Logic Model

Long Term Outcomes/Impacts	Interim Indicators of Success/ Outputs	Program Activities/Strategies
1) By 2025, increase the percentage of the region's 4th, 8th, and 12th graders that are "proficient" and "advanced" in math as measured by the Smarter Balanced assessment. 2) By 2025, increase the number of STEM college graduates that matriculate from partner schools. 3) Increase STEM participation, persistence, and achievement based on ethnic/cultural and/or socioeconomic background, limited English language proficiency, gender, or disability. 4) Improve Oregon business and industry access to an Oregon-educated STEM talent pool that is highly skilled, motivated and globally competitive. Evidence-based causal assumptions: - Improving teaching practices leads to improved student proficiency - Learning communities extend professional development into the classroom and support teachers to change practices - Contextualized, applied learning increases student engagement and proficiency - Earning early college credits improves student confidence and college matriculation rates	**Overall SMS STEM Hub:** highly functional, with infrastructure to carry out work	
	• Partnership Agreements refreshed and signed • Five-year business plan with sustainability strategies • Monthly communication and active website • Funding secured • Shared definitions and measures refined and collected • Initial evaluation completed • Equity training and expansion of partners accomplished	• Hire STEM Hub Executive Director to strengthen STEM Hub Backbone organization • Update strategic business plan • Conduct ongoing communications with all partners • Write grant proposals and develop private resources • Collect and evaluate data • Develop evaluation plan and conduct initial evaluation • Utilize Equity Lens to provide training for all partners • Add more community partners focused on underserved populations • Add more active business partners and sponsors
	STEM Professional Learning Community: a learning community of teachers and community partners to share and expand effective instructional practices.	
	Number of teachers participating in STEM learning communities	1.1 Establish professional learning community to share effective practices and STEM curriculum among partners, and determine professional development model; Utilize teacher-leaders to develop district-level STEM Implementation Plans.
	Number of teachers who have changed practices: STEM curriculum or contextualized learning	1.2 Assist teachers to effectively utilize community and business volunteers to support common core standards (CCSS) and next generation science standards (NGSS)
	STEM NETwork of mentors, programs and events that inspire students and sponsors to utilize the region's rich industry and community resources.	
	Short-term matching system in place; and decision about long-term platform	2.1 Establish electronic matching system to connect industry and community resources to schools and teachers
	Number of business and community partners in system	2.2 Develop business and community capacity to populate STEM Network and understand how to offer meaningful experiential learning
	Number of teachers using system	2.3 Develop teacher capacity to use STEM Network
	Number of experiences in system	2.4 Align menu of STEM Network volunteer experiences with CCSS and NGSS to support learning outcomes.
	STEM Accelerated Credit: Expanded collaborations between schools, colleges and universities to accelerate students through dual credits, advanced placement, and incentives.	
	Number of college-going incentives: scholarships, preferential admissions	3.1 Develop articulated programs between partner schools, colleges and universities, and increase college-going incentives
	Number of dual or accelerated STEM courses in partner districts	3.2 Increase % of partner high school students getting accelerated credits
	Total Direct Impact from all SMS STEM Partnership Activities during grant period:	**100 teachers** **45 counselors** **5,500 students** **80 post-secondary faculty**