

Draft Memo

From: Michael Magee [REDACTED]
To: Devon Puglia <[REDACTED]>
Cc: Julia Rafal-Baer <[REDACTED]>
Date: Sun, 03 Jan 2021 13:51:54 -0500

Yeah, that sounds right. Do you want to make that edit and then I can send a draft to Dan and Joe Rodio Jr?

On Thu, Dec 31, 2020 at 7:12 PM Devon Puglia <[REDACTED]> wrote:

Great.

On this question, it feels like it makes sense to recommend that he take the public position that he should appoint the next LG, while privately working behind the scenes with legislative leadership for their input and blessing...and that the actual announcement of an appointment happen within a week of taking office (via a joint statement with legislative leadership in a perfect world if everyone is aligned on diossa). Does that sound right?

Sent from my iPhone

On Dec 31, 2020, at 6:13 PM, Michael Magee <[REDACTED]> wrote:

This looks really great. The one thing it seems to be missing is how we should deal with this potential drama around whether Dan gets to appoint the LG. He will need answers to both 1) whether he should have the right to appoint; and 2) who he plans to appoint. And we should think about when the ideal time would be for him to make moves on this front. My guess is James Diosa and Dan will have to coordinate on a behind the scenes effort to get state house leadership to sign off on Dan appointing James.

On Thu, Dec 31, 2020 at 9:54 AM Devon Puglia <[REDACTED]> wrote:

Hey all —

Just wanted to check in to see if there was any other feedback or whether we think it's in a good place to ship off.

Thanks!

Sent from my iPhone

On Dec 30, 2020, at 6:41 PM, Julia Rafal-Baer <[REDACTED]> wrote:

This looks really solid. Thank you. I'm worried Gov is going to say some under handed things to make the Lt Gov look weak. Is there some proactive path for the next few weeks the Lt Gov should articulate that shows his power AND his commitment to listening and working with the assembly and speaker immediately?

On Dec 30, 2020, at 6:36 PM, Devon Puglia <[REDACTED]> wrote:

Mike and Julia —

Attached is a draft memo that we discussed yesterday following the call. Hopefully this will help lay out some clear next steps for the team on what could be ahead and how to

approach it. Let me know if you have any feedback, thoughts, questions, edits, concerns – anything at all.

Thanks so much!

<Transition Communications Memo - 630PM.docx>

From: [Dan McKee](#)
To: [Michael Magee](#)
Cc: [Joe Rodio](#); [Devon Puglia](#); [Julia Rafal-Baer](#)
Subject: Re: Draft Memo
Date: Sunday, January 3, 2021 6:20:16 PM

Thank you Mike

Sounds like something will happen soon and it looks like there will be many moving parts to a thoughtful and affective transition plan.

FYI. The Gov's chief of staff and Tony Silva have had a discussion last Wednesday that we need to detail for as you. On the call with Tony the Gov's Chief of Staff said that if there is a confirmation the Gov will be calling me first. During the call the Gov's Chief of Staff indicated that they wanted a smooth transition .

Some thoughts on the memo

1. We will need to bring Andrea our communications director into the loop ASAP.
2. We will need more than just Andrea to execute a final plan .
3. I agree that the COVID crisis is top priority but I will be expected to make an effort to get more Cares Act funds to small businessesmy goal is an additional \$20 to \$30M in grants to small businesses through a Restore RI 2 plan. If the Gov calls I plan to ask if she would work with me during transition to make more grants available to small businesses..
4. As far as me appointing the LG.....word is that the Speaker is getting pressed to pass legislation passed for the House to appoint one of their own. I have sent back the message that I would like to make the appointment and that it would be a sign of good faith to have me make the appointment and not force an unwanted LG on me.
5. I think we can use our Wednesday Community conversation to facilitate many of these public discussionsI have extended an invite to the new Speaker who has accepted the invite...
6. Need to build a local PR team that can partner with Devon to execute final plan.

Much more the follow up on. I will be looking for comments from Joe and Tony.

Thanks for your help.

Dan

Sent from my iPhone

> On Jan 3, 2021, at 2:51 PM, Michael Magee < wrote:

>

>

> Hi Dan,

>

> Please see the attached draft communications plan. As you'll see it's quite comprehensive. Our thinking on this is that you get one shot to introduce yourself as Governor. We want to anchor your key themes and maximize positive earned media. You're well known throughout the state of course but voters will be meeting Governor McKee for the first time. As you know, Seth's campaign in particular is already in motion. We have an opportunity to make sure he and others are forced to run against a true incumbent.

>

> Of course, the elements of the plan need to feel good to you. Any feedback you have we'll incorporate and adjust. Wherever we land, we will big-donor fundraise with an external-facing version of this plan.

>

> We have new additional intelligence that Gina has at least been offered Commerce. No guarantee but everything is certainly pointing in that direction.

>

> Best,

>

> Mike

>

><Transition Communications Memo - 01.03.21.docx>

Subject: Re: Draft Memo

From: Michael Magee <[REDACTED]>

Date: 1/4/2021, 3:28 PM

To: Devon Puglia <[REDACTED]>

CC: Julia Rafal-Baer <[REDACTED]>

Talking to Dan later this afternoon. Hang tight for now.

On Mon, Jan 4, 2021 at 9:24 AM Devon Puglia <[REDACTED]> wrote:

Hey all —

Based on Dan's email regarding the doc yesterday, just wanted to check in to see if there was anything at all you needed from me. I don't believe there is a specific next step at this exact moment, but if there's anything I can or should do in advance of a potential announcement, just let me know.

Thanks so much.

Sent from my iPhone

On Jan 3, 2021, at 1:52 PM, Michael Magee <[REDACTED]> wrote:

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Thanks so much!

<Transition Communications Memo - 630PM.docx>

Subject: Re scope

From: Julia Rafal-Baer <[REDACTED]>

Date: 1/4/2021, 9:12 PM

To: Kevin Huffman <[REDACTED]>

Hi Kevin,

One more thought on this. Given the McKee situation, should we include an additional part to this scope for support to the Governor's office? It's not going to be a light lift what's ahead. I'm happy to add time to this scope if it feels helpful for this?

Best,
Julia

On Dec 21, 2020, at 8:46 PM, Julia Rafal-Baer <[REDACTED]> wrote:

Hi Kevin,

Thank you again - so much - for the chance to partner in 2021 with you guys. I wanted to touch base on the the scope for the Jan 1 - Dec 31 contract.

Below is what we had before. I think it still makes sense, but from our call what I think I heard, and please confirm, is that we would include here the expectation that this scope includes my support for Excel in navigating our ecosystem, building relationships (advisory board members, key players, funders) and whatever additional support AF gets as part of those needs. In addition, supporting the recruitment of and execution of new operators is a key goal for 2021, as well as developing stronger community engagement strategies. Does that seem right?

What is not included below, and sounded like you were comfortable with, but I want to stay above baord would be me separately contracting with and providing expertise to other ecosystem players, including Bill, George and Vitale in their political efforts. I would bill them for an hourly rate for my time and expect to contract with them directly.

If all this makes sense, please let me know if the revised version below with the bold will work for a contract with your end. Really appreciate this chance to continue to build out the Providence portfolio model. Can't believe how far we got things this year.

Consultant shall make themself available to provide consulting and advisory services to the Organization for the purpose of advancing school turnaround work in Providence, Rhode Island. This work will include, but is not limited to, on-site meetings in the Rhode Island Department of Education and the Providence Public School Districts, design work to

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My best,
Julia

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From: **Kevin Leslie via DocuSign** <[REDACTED]>
Date: Thu, Oct 8, 2020 at 7:54 PM
Subject: Completed: Please DocuSign: Hope Street Consulting and TCF Agreement IV
To: Julia Rafal-Baer <[REDACTED]>

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Kevin Leslie
[REDACTED]

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<Hope Street Consulting and TCF Agreement IV.docx.pdf>

Fwd: Fundraising

From: Devon Puglia <[REDACTED]>
To: Julia Rafal-Baer <[REDACTED]>
Cc: Alex Bloom <[REDACTED]>
Date: Tue, 05 Jan 2021 10:48:02 -0500

FYI

Sent from my iPhone

Begin forwarded message:

From: Alex Bloom <[REDACTED]>
Date: January 5, 2021 at 10:44:43 AM EST
To: Devon Puglia <[REDACTED]>
Subject: Fundraising

As of 9/30/20

General Treasurer Seth Magaziner

Ending cash balance: \$963,654.10

Individual contributions during quarter: \$80,085

Political action committees during quarter: \$7,200

Providence Mayor Jorge O. Elorza

Cash balance: \$727,081.90

Individual contributions: \$76,425

PACs: \$0

Secretary of State Nellie M. Gorbea

Cash balance: \$329,675.62

Individual contributions: \$63,512

PACs: \$3,500

Lieutenant Governor Daniel J. McKee

Cash balance: \$104,561.96

Individual contributions: \$25,250

PACs: \$150

Alex Bloom | Senior Vice President | SKDKnickerbocker

██████████ (O) | ██████████ (C) | ██████████

Subject: Fwd: Fundraising

From: Julia Rafal-Baer <[REDACTED]>

Date: 1/5/2021, 10:54 AM

To: Michael Magee <[REDACTED]>

Oy vey

----- Forwarded message -----

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Date: Tue, Jan 5, 2021 at 10:48 AM

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Cc: Alex Bloom <[REDACTED]>

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Alex Bloom | Senior Vice President | [SKDKnickerbocker](#)

██████████ (O) | ██████████ (C) | ██████████

Subject: Re: Ongoing clips

From: Devon Puglia <[REDACTED]>

Date: 1/7/2021, 4:25 PM

To: Julia Rafal-Baer <[REDACTED]>

CC: Michael Magee <[REDACTED]>

We will send to you on a separate track just so we don't have any bcc mix ups or issues

Sent from my iPhone

On Jan 7, 2021, at 4:08 PM, Julia Rafal-Baer <[REDACTED]> wrote:

Can Alex add us to the bcc for clips?

On Thu, Jan 7, 2021 at 3:53 PM Devon Puglia <[REDACTED]> wrote:

Sent from my iPhone

Begin forwarded message:

From: Alex Bloom <[REDACTED]>

Date: January 7, 2021 at 3:52:22 PM EST

To: Andrea Palagi <[REDACTED]> Brian Jencunas <[REDACTED]>
Miketrainorconsulting

Cc: Devon Puglia <[REDACTED]>

Subject: Ongoing clips

Hi everyone – a few clips below. We'll keep you updated as more come in.

Thanks,

Alex

Alex Bloom | Senior Vice President | [SKDKnickerbocker](#)

[REDACTED] (O) | [REDACTED] (C) | [REDACTED]

National News

New York Times: [Biden Picks Rhode Island Governor for Commerce Secretary](#) (1.7.21)

Associated Press: [AP source: Biden to pick Rhode Island Gov. Raimondo as Commerce secretary, Boston Mayor Marty Walsh to lead Labor Dept](#) (1.7.21)

CNN: [Biden poised to tap Rhode Island Gov. Gina Raimondo to lead Commerce Department](#) (1.7.21)

Wall Street Journal: [Biden to pick Rhode Island Gov. Gina Raimondo as commerce secretary](#) (1.7.21)

Bloomberg: [Rhode Island Governor Gina Raimondo Tapped for Commerce Chief](#) (1.7.21)

The Hill [Biden selects Gina Raimondo for Commerce chief: reports](#) (1.7.21)

The Week: [Biden reportedly nominating Boston Mayor Marty Walsh as labor secretary, Rhode Island Gov. Gina Raimondo for commerce](#) (1.7.21)

The Washington Post: [Biden taps Rhode Island Gov. Gina Raimondo as Commerce Secretary, Boston Mayor Marty Walsh for Labor](#) (1.7.21)

Politico: [Raimondo selected for Biden's Commerce secretary](#) (1.7.21)

USA Today: [Biden to pick Rhode Island Gov. Gina Raimondo as Commerce secretary](#) (1.7.21)

CBS News [Biden to nominate Rhode Island Governor Gina Raimondo to be commerce secretary](#) (1.7.21)

PBS Newshour: [Biden picks Rhode Island Gov. Gina Raimondo as commerce secretary](#) (1.7.21)

Reuters: [Biden picks Rhode Island governor to head Commerce, Boston mayor for Labor: sources](#) (1.7.21)

Fortune: [Biden taps Rhode Island Governor Gina Raimondo as Commerce Secretary](#) (1.7.21)

Chicago Tribune: [Joe Biden picks Rhode Island Gov. Gina Raimondo, former venture capitalist, to be commerce secretary](#) (1.7.21)

Local News

Boston Globe: [In less than 30 minutes, New England politics is altered with news of two cabinet picks](#) (1.7.21)

WJAR: [Report: Biden picks Raimondo for U.S. commerce secretary](#) (1.7.21)

WPRI: [Raimondo picked for US commerce secretary](#) (1.7.21)

WBUR: [Biden Reportedly Picks Rhode Island Gov. Raimondo As Commerce Secretary](#) (1.7.21)

NBC Boston: [Biden Taps Boston Mayor Walsh for Cabinet; RI Gov. Raimondo, Too, Report Says](#) (1.7.21)

Providence Journal: [Raimondo is Biden's pick for commerce secretary, NY Times reports](#) (1.7.21)

Boston, Will Weissert: [Biden picks Rhode Island Gov. Raimondo as commerce secretary](#) (1.7.21)

Newport Daily News: [State Sen. DiPalma eyes top role as rumors swirl about Gov. Raimondo's future](#) (1.7.21)

Newport Buzz: [Rhode Island Governor Raimondo Selected For Biden's Commerce Secretary](#) (1.7.21)

What's Up Newp: [Report: President-elect Biden is set to tap Governor Raimondo for U.S. Commerce Secretary](#) (1.7.21)

ABC 6: [Reports: Rhode Island Governor Biden's pick for Commerce Secretary](#) (1.7.21)

Rhode Island Inno: [Rhode Island Gov. Gina Raimondo tapped as commerce secretary](#) (1.7.21)

TV Clips

-

NECN: [Rhode Island Governor Gina Raimondo Selected as Commerce Secretary](#) (1.7.21)

CNBC World: [Gina Raimondo is President-elect Biden's Commerce Secretary](#) (1.7.21)

WJAR: [What if Raimondo takes a position from the Biden Administration?](#) (1.7.21)

Subject: Re: Re scope

From: Julia Rafal-Baer <[REDACTED]>

Date: 1/11/2021, 8:08 AM

To: Kevin Huffman <[REDACTED]>

Hi Kevin,

Happy Monday! I wanted to touch base with you on the best scope for this year. My current thinking is as follows:

- 1) Jan 1 - Dec 31: \$20k / month for JRB for support for AIG and team, Harrison and team + helping the mayoral academies, including Excel. See current / revised below.
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The open question for my work is Gallagher. He and I are game to partner up if he decides to stay. He will have a revolving door issue. We can revisit this next month once we know his plan I guess?

Please let me know how this sits. Happy to jump on a call.

My best,
Julia

On Mon, Jan 4, 2021 at 9:12 PM Julia Rafal-Baer <[REDACTED]> wrote:

Hi Kevin,

One more thought on this. Given the McKee situation, should we include an additional part to this scope for support to the Governor's office? It's not going to be a light lift what's ahead. I'm happy to add time to this scope if it feels helpful for this?

Best,
Julia

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Date: Thu, Oct 8, 2020 at 7:54 PM
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To: Julia Rafal-Baer <[REDACTED]>

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Kevin Leslie
[REDACTED]

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COVID plan - confidential

From: Julla Rafal-Baer <[REDACTED]>
To: Devon Puglla <[REDACTED]>
Date: Wed, 13 Jan 2021 18:21:58 -0500

Hi Devon,

Can you guys please help with a memo on a COVID comms plan for Dan to consider using once he takes over. First, publicly moving teachers from a planned group 2 to group 1B (confidential that they are in 2 right now). Second, potential of him saying teachers in highest covid places would go first (providence and central falls) and the political risks and considerations for this decision outlined and with recommendations. Third, press events and strategies around COVID in schools that can anchor the first 3-4 weeks. AIG had an idea of them going together with a few teachers to get vaccinated, having band-aids made to support teachers here (like the hat idea!!!). In addition, nurses have to volunteer to sign-up to be trained to deliver the vaccine -- what should the approach be on here, what messages, what can Dan be doing to drive this and what should AIG do role-wise.

Can you please help with this ASAP?

Thank you!

Subject: Re: Re scope

From: Julia Rafal-Baer <[REDACTED]>

Date: 1/18/2021, 1:50 PM

To: Kevin Huffman <[REDACTED]>

Hi Kevin,

I talked with Gallagher for a while and here is what we would love to propose. A few background items:

- 1) Gallagher thinks his last day is around a month from now. He won't know for another few weeks (earliest) and possibly not for another few months what exactly the jobs are that he will be able to pursue in DC with Raimondo. The process is long and he does not intend to go for just anything.
- 2) If he does not go, we are going to partner up for moving forward.
- 3) If he does go, he believes he will have at least a month between knowing he is going and when he has to start where he can consult.

The deliverables he would ideally work on include: CBA negotiations, support for the takeover, blocking the charter bill, strategy advising for AIG. He has a revolving door issue so we would trade places as necessary for accomplishing the blocking of the charter bill, in particular. The most important would be an expansive strategy memo that helps me to take the [RI surrogate workbook](#) to mapping the risks ahead and what we need to keep momentum going for charters.

Ideally, Gallagher would work 16 days for the first month he is out and then drop down to 8 days for the remaining months. We have some other philanthropy that we can bring to this for his time on the CBA work if he does stay.

Can you please let me know if it generally sounds right to you to have Gallagher on a contract for roughly 2/15 - 3/15 for \$32k? We don't have to solve this for January, but if you all feel like that is too much, I just want to level-set appropriately.

Additionally, putting the bullets below for my scope as this chain is confusing enough already -- please let me know if you had any concerns about the outline below, and if it feels right to you, whether you wanted me to work directly with Kevin Leslie on the contract or what is easiest.

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- 3) Jan 1 - March 30: \$2,500k / month for JRB support for the new Gov and his team. I do not think I will need to be doing the kind of work I am doing now for more than their first three months. At that time, I think we can fold anything I do into my existing retainer.

The open question for my work is Gallagher. He and I are game to partner up if he decides to stay. He will have a revolving door issue. We can revisit this next month once we know his plan I guess?

Please let me know how this sits. Happy to jump on a call.

My best,
Julia

On Mon, Jan 4, 2021 at 9:12 PM Julia Rafal-Baer <[REDACTED]> wrote:

Hi Kevin,

One more thought on this. Given the McKee situation, should we include an additional part to this scope for support to the Governor's office? It's not going to be a light lift what's ahead. I'm happy to add time to this scope if it feels helpful for this?

Best,
Julia

On Dec 21, 2020, at 8:46 PM, Julia Rafal-Baer <[REDACTED]> wrote:

Hi Kevin,

Thank you again - so much - for the chance to partner in 2021 with you guys. I wanted to touch base on the the scope for the Jan 1 - Dec 31 contract.

Below is what we had before. I think it still makes sense, but from our call what I think I heard, and please confirm, is that we would include here the expectation that this scope includes my support for Excel in navigating our ecosystem, building relationships (advisory board members,

key players, funders) and whatever additional support AF gets as part of those needs. In addition, supporting the recruitment of and execution of new operators is a key goal for 2021, as well as developing stronger community engagement strategies. Does that seem right?

What is not included below, and sounded like you were comfortable with, but I want to stay above board would be me separately contracting with and providing expertise to other ecosystem players, including Bill, George and Vitale in their political efforts. I would bill them for an hourly rate for my time and expect to contract with them directly.

If all this makes sense, please let me know if the revised version below with the bold will work for a contract with your end. Really appreciate this chance to continue to build out the Providence portfolio model. Can't believe how far we got things this year.

Consultant shall make themselves available to provide consulting and advisory services to the Organization for

the purpose of advancing school turnaround work in Providence, Rhode Island. This work will include, but is not limited to, on-site meetings in the Rhode Island Department of Education and the Providence Public School Districts, design work to ensure strategic planning advances, and support of communications and strategic consultants hired by the Organization, RIDE or PPSD. In providing such consulting and advisory services, Consultant shall provide the Organization with such of their assessments and evaluations as the Organization may deem necessary. Consultant agrees to attend such meetings, either in person or by telephone, as the Organization may require for proper communication of their advice and consultation.

REVISED:

Consultant shall make themselves available to provide consulting and advisory services to the Organization for

the purpose of advancing school turnaround work in Providence, Rhode Island. This work will include, but is not limited to, on-site meetings in the Rhode Island Department of Education and the Providence Public School Districts, design work to ensure strategic planning advances, and support of **parent engagement efforts**, communications and strategic consultants hired by the Organization, RIDE or PPSD. **Support shall also include necessary supports to Excel Academy in local strategy, building relationships, navigating facilities, and developing an advisory board; in addition, general support hours for the RI Mayor Academies will be shared and included in this.** In providing such consulting and advisory services, Consultant shall provide the Organization with such of their assessments and evaluations as the Organization may deem necessary. Consultant agrees to attend such meetings, either in person or by telephone, as the Organization may require for proper communication of their advice and consultation.

My best,
Julia

----- Forwarded message -----

From: **Kevin Leslie via DocuSign** <[REDACTED]>

Date: Thu, Oct 8, 2020 at 7:54 PM

Subject: Completed: Please DocuSign: Hope Street Consulting and TCF Agreement IV

To: Julia Rafal-Baer <[REDACTED]>

DocuSign



Your document has been completed

[VIEW COMPLETED DOCUMENT](#)

Kevin Leslie
[REDACTED]

All parties have completed Please DocuSign: Hope Street Consulting and TCF Agreement IV.

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<Hope Street Consulting and TCF Agreement IV.docx.pdf>

Document re: RI work

From: Devon Puglia [REDACTED]
To: Julia Rafal-Baer [REDACTED]
Date: Wed, 20 Jan 2021 20:57:14 -0500
Attachments: RI Proposal_1.14.21 -- FINAL.docx (169.03 kB)

Julia --

Attached is a doc we discussed for your call tomorrow. Let me know if you have any questions at all.

Thanks.



MEMORANDUM

To: Julia Rafal-Baer and Michael Magee Jr.

From: Devon Puglia and Alex Bloom, SKDKnickerbocker

Date: January 14, 2021

Re: Rhode Island Communications Support

OVERVIEW

With the selection of Rhode Island Governor Gina Raimondo as the next Commerce Secretary, the state will be entering a transition as Lieutenant Governor Dan McKee is elevated to lead. But unlike many states across the country, Rhode Island's top two leaders do not pursue elective office as a ticket, and McKee has not been Raimondo's governing partner. The fact is that the next steps, and ensuring Lt. Governor McKee's success, are critical to the future of education policy in the state, to protecting the education progress that's already been made, and ensuring the expansion of high-quality charter schools in the state.

At a time when Rhode Island is battling a historic pandemic that has threatened public health and crippled the economy, McKee is stepping into the executive office with limited familiarity with the state's commissioners, programs, and processes developed by Raimondo's leadership team. There are also many questions swirling around education policy, the vaccine, and whether schools should be open. Put simply, Rhode Islanders as well as its children can't afford for McKee to start slow. A turbulent initial period could put the education ecosystem in jeopardy, and it's critical that he hit the ground running.

McKee's best defense will be a good offense – starting his tenure with a strong message and a visible presence across Rhode Island to ensure children, schools, residents, families, and businesses connect with him and have confidence in his leadership. Public charter schools, sound education policies, and children themselves who rely on new school options are depending on his success. The future of the education ecosystem and McKee are directly linked.

SKDK's political track record – working with Presidential candidates, Governors, elected officials, and chief executives to strengthen their profile – is second to none. We are also intimately familiar with the governing challenges presented by COVID-19, working with some of nation's largest and highest-profile hospitals to help them communicate during the pandemic. We also know education policy like no other public affairs firm in the nation.

At this moment, during this unique time of transition, the education ecosystem needs someone thinking about its future and about what its future holds in a McKee administration. We are prepared to play that role, and support communications about the intersection and help provide the McKee transition the aircover it needs.

OUR STRATEGIC OBJECTIVE

To help support the education ecosystem with political guidance, develop communications to help provide aircover and public support for the incoming governor, and where necessary help the transition team communicate effectively with the public.

DELIVERABLES

The following outlines how the project could be broken down in terms of deliverables.

Three Months

Through a three-month project, we would focus on an intensive short-term sprint. That includes:

- Being a strategic communications adviser to the education ecosystem on politics, planning, messaging, and tactics as this transition period happens
- Supporting communications for the ecosystem around the vaccine, educators and schools
- Supporting the McKee transition team and advising on press releases, statements, advisories, and rapid response where appropriate, particularly around education communications
- Monitoring for changes in education policy
- Conducting comprehensive news and social media monitoring on the McKee Transition Team and education news

Six Months

We would view a six-month project as a combination of our intensive short-term sprint in the initial three months with longer-term surrogate development in the latter period of the project. A six-month project would include all of the above, but would focus more on providing air-cover and working with educational partners to communicate in support of the administration. That would include:

- Drafting surrogate talking points, op-eds, and other communications in support of the McKee team and of the ecosystem

- Working with and helping activate educational partners, public charter school network leaders, and partners in the ecosystem to proactively communicate in support of the incoming governor
- Develop a six month communications plan for the ecosystem in support of the transition and the new governor

BUDGET

To execute this scope, SKDK would charge a retainer based on the schedule of our engagement.

- For a three-month engagement, SKDK would charge \$25,000 per month for a project focused on intensive early support.
- For a six-month engagement, SKDK would charge \$20,000 per month combining our intensive early support with longer-term more surrogate support and communications planning, particularly around education policy.
- For a full-year engagement, SKDK would charge \$15,000 per month for transition support, initial brandbuilding, long-term outside communications support, and long-term political advice for the education ecosystem.

THANK YOU

For any follow-up questions, please contact:

- Alex Bloom | [REDACTED]
- Devon Puglia | [REDACTED]

Subject: SKDK/Team McKee transition work

From: Alex Bloom <[REDACTED]>

Date: 2/1/2021, 6:12 PM

To: Michael Magee <[REDACTED]> Julia Rafal-Baer <[REDACTED]>

CC: Devon Puglia <[REDACTED]>

Hi Mike and Julia,

Hope you're both doing well. We wanted to send a quick update on our work with Team McKee.

Today, we worked with their team on the following:

- Devon and I conducted an hour-long media training session with LG McKee, which included Mike Trainor and Andrea Palagi. We walked him through the attached deck and showed him clips from his previous media hits to offer advice and feedback for how to approach upcoming interviews and press conferences.
- In response to a Boston Globe request on the LG's position on environmentalism, our team drafted the quote below from McKee.
- Our team offered edits to the readout (Google Doc link below) from the LG's office on his call with mayors and municipal leaders.
- Our team also participated in the daily comms call with the LG, Joe Rodio, Mike Trainor, Andrea Palagi, and others.

My apologies if we need to step up our efforts in keeping you posted about our ongoing work with Team McKee. We'll be sending along a tracker this week of our efforts up to this point.

Thanks,
Alex

Alex Bloom | [SKDKnickerbocker](#) | [REDACTED] (C)

Boston Globe response:

"Climate change is real — and it's a potentially cataclysmic crisis. However, unlike the pandemic, there is no vaccine. The only antidote is for us, as both a nation and a state, take steps to mitigate that crisis and reduce our carbon footprint. Climate change isn't just about the kind of world we leave to our children and our grandchildren, and it isn't just about protecting the natural resources of Rhode Island for generations to come. It's also about our economy. The future is in green jobs and green energy — not the energy sources of the past. We can and must seize every opportunity to create the very jobs that we know will power our state and nation for decades to come. That means we have not just a moral obligation, but also an economic imperative to act with urgency."

Municipal Leaders Readout:

https://docs.google.com/document/d/1jqPn_-W1tSWbGus2ior9C49a5TPZJnugO9h15tPLCg/edit

— Attachments: —



Navigating Media Interviews

Media Training

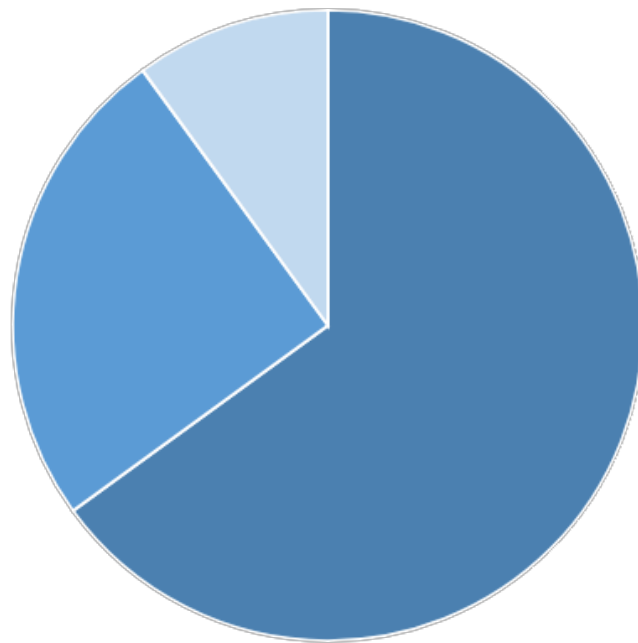
Presented by SKDKnickerbocker

What Success in Media Interviews Looks Like:

Speaking Directly to Rhode Island families about our priorities: Efficiently rolling out vaccinations so that we can accelerate Rhode Island's recovery and make our state a great place to live and do business.

**Television
is a
visual medium.**

- 1. How you look.**
- 2. How you sound.**
- 3. What you say.**



How you look.



Body



Head



Hands



Eyes



Smile



Always remember your backdrop.



Connecticut governor photobombed by beluga whale

By Associated Press

September 4, 2015 | 10:35am



Dannel Malloy speaks at a news conference, while Juno the Beluga whale swims at the Mystic Aquarium in Mystic, Conn

This Beluga Whale Totally Stole The Show From Connecticut's Governor During A Press Conference

OH HAI.

Posted on September 3, 2015, at 12:17 p.m.



Stephanie McNeal
BuzzFeed News Reporter

[View 14 comments ↓](#)



Connecticut Gov. Dan Malloy was trying to do a press conference at the Mystic Aquarium on Wednesday when he got interrupted by the cutest photobomber ever.



Juno the beluga whale clearly saw the cameras, and couldn't resist taking some time in the spotlight.



Always remember your backdrop.



Room Rater @ratemyskyperoom · 20h

Love the colors. Great cover. Lamp is great. Work on lighting issue. 7/10
@SenatorGill



13

4

200



Room Rater @ratemyskyperoom · 5h

Continuing to soar with Room Rater. Expertly composed book corner with plant. 10/10 @MelissaLeeCNBC



12

12

494



How you look.

Pay attention to lighting.



How you sound.



Volume



Velocity



Variation



Punctuation



Pause

In Summary: Broadcast Interview

How to Sound:

- Be mindful of your **volume** and **velocity**, remembering that speaking lowly and slowly cuts through interruptions.
- Use **variation in pitch** to keep the audience interested and signal important points. Know when to stop. **Punctuate** your answers with a message point. **Pause**. It can be your most powerful vocal tool.

How to Look for TV:

- Reduce your movement, because **small movements become large**. **Don't nod** during questions.
- Maintain eye contact with the person asking the question, keep your listening face positive, and smile **even if you disagree**.
- **Sit upright** and keep your hands out of the frame.

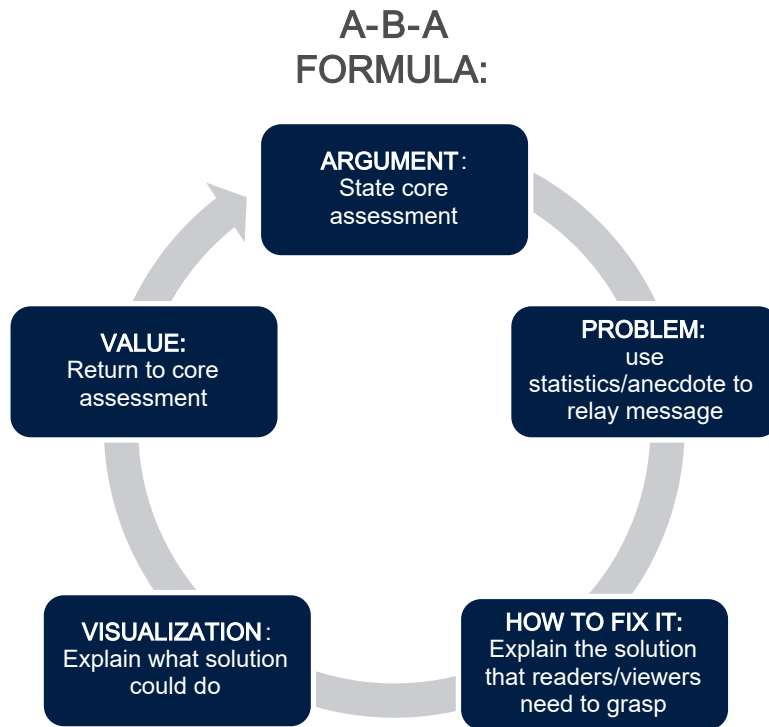
How Can You Deliver Your Message?

- Without a clear and concise explanation that can help the public relate, our message can fall flat for our key audience – the reporter or producer.
 - Regardless of the question, SKDK recommends addressing the issue and then pivoting to the core message. **In media interviews, it's important to be responsive, but we can't get so caught up in details or statistics that we downplay the clear benefits of the project.**
- **Goal:** Ensure that your priorities end up quoted in the final TV piece, radio story, or article.
- Never forget: It looks and feels like a conversation, but it's not – it's a communication.

A-B-A: A Key Formula for a Strong Delivery

Media interviews are often short, providing a limited opportunity to get your point across

- Start with your point – don't build up to your point.
- Try to follow an overall A-B-A structure to start and end with your main point.
- Example: [In this clip of Professor Adam Galinsky](#), he clearly demonstrates and A-B-A format



Tips and Tools

- **Do Your Homework**
 - Know the reporter's focus, the topic, and the audience. Team McKee will always brief you on this.
- **Regardless of the Question, Emphasize Your Point**
 - Don't wait for the question that will set up your top argument. **This is our opportunity to communicate our message, so bridge quickly to it.**
- **Avoid Tangents**
 - It's important not to try to overly focus on educating a reporter on a tangential topic – especially given their limited time.

Tips and Tools

Controlling the Interview – Bridging, Blocking and Pivoting

- What's most important...
- Let's step back and look at bigger picture...
- Let's look at it from a broader perspective
- Keep in mind...
- There is more to the story, specifically...
- Another more important piece...
- Well that's not what we hear from our...
- That may have been true years ago, but today...
- If you remember one thing, it's...
- What's important to focus on is...

Example: [In the first five minutes of this State Department Briefing](#), Jen Psaki remains calm during difficult questioning, frequently pivots to approved messaging, and answers questions on her terms.

Media Scenario: Print Interview

Try to Connect

- When possible, it's good to build a rapport with reporters
- Come to the conversation with positivity and be respectful

A Conversation on Your Terms

- Reporters often have a key topic to discuss: plan ahead and practice the difficult responses
- Use pivots to control the interview and focus the conversation on safe topics **and deliver our messages**
- Don't fill space: It's normal to want to continue speaking when there's silence, but stay focused on delivering your answer
- Clearly state when you're on the record, off the record, or on background. Most background or off the record conversations will be handled by Mike Trainor or Andrea Palagi, so unless the reporter says otherwise – assume you are on the record.

False sense of security

- **Reporters aren't your friends.** The most common mistakes happen when we think a conversation is going well and it veers onto an uncomfortable topic.

Media Scenario: Press Conference

Practice makes perfect:

- **Organize** who will be answering questions on each topic
- Practice your answers to the most **difficult questions**

Listening and Responding:

- **Demonstrate active listening:** restate the question for clarity and frame your response
- **Be honest** when you don't have the answer to a specific question and offer to get the answer for them later.
- Technical jargon, acronyms and even the names of agencies can be difficult: try to put answers in terms that the general public can understand.
- **Be concise in your answer** and focus on pieces that are **relevant** to the audience

Pushback is expected

- Mentally and emotionally prepare for conflict, and **work to de-escalate**
- It's likely that a confrontational reporter might not trust your information/answer: **don't be defensive** .

Tips and Tools

De-escalating Conflict

De-escalating conflict comes down to respectfully acknowledging the point that your opponent is making, while ensuring that you maintain control of the conversation. After quickly acknowledging your opponent, you'll want to think back to bridging, blocking and pivoting.

- I hear your point, but let's step back and look at bigger picture...
- That's a great question...let's take a moment to look at it from a broader perspective...
- You raise a good point but there is more to the story...specifically...
- I hear your concerns...that may have been true years ago, but today...
- That's an important point...let's take a moment to walk through how we're addressing it
- I get where you're coming from...but the truth is...

Subject: FW: SKDK Proposal -- paid media

From: [REDACTED]

Date: 2/8/2021, 10:28 AM

To: [REDACTED] "Mike Magee" [REDACTED]

Joe and Mike,

Please see attached proposal from SKDK for campaign consulting services.

NOTE: Devon called me this weekend to let me know that have passed on an opportunity to work with another likely gubernatorial candidate...he could not say which one. They clearly would like to work with Dan.

Mike Trainor

[REDACTED]

— Attachments: —

SKDK_Proposal_Team McKee[3].pdf

316 KB

Untitled attachment 03304.htm

176 bytes

Team McKee

January 26, 2021

To Team McKee
From SKDK
Date January 26, 2021
Re 2022 Campaign Proposal

INTRODUCTION

Rhode Island is truly at a historic moment—and at an inflection point. COVID-positive cases are some of the highest in the world per capita. The vaccine rollout under the current administration has been confusing and restrictive. Small business owners are struggling to keep the lights on and wonder whether they will be able to make payroll each week. With job losses across every sector, working families are concerned about whether they can afford to stay in their homes. And in this once-in-a-century public health crisis, children—the future of Rhode Island—are experiencing learning loss in a way that could reverberate for generations to come.

As you prepare to take office, multiple issues of the state’s COVID-19 response will demand your attention. But even at this early stage, we know exactly what the 2022 gubernatorial primary and race will be about: the effectiveness of the vaccine rollout and the corresponding economic recovery. The two are inextricably tied—delivering vaccines quickly and thoughtfully to Rhode Islanders will improve safety, boost confidence, and get the state moving. That means the next several months will be critical in leaving an impression with the electorate that will be solidified more and more as you govern. This moment is truly an opportunity to show that Rhode Island can depend on your steady leadership, sincere dedication to the job, and record of success. Indeed, next year’s primary and general election will be about telling the story that you are writing now, at this moment.

As you govern, you will need to simultaneously put a campaign team and infrastructure in place to ensure you can tell that story and communicate your case for a full term. You will be able to utilize the next 18 months as the incumbent to elevate your priorities and build trust with Rhode Island voters, and your campaign team will work closely with you along the way to ensure that you’re developing a strong candidacy, reaching out to new contacts, and touching every corner and constituency in the state in a way that contributes to your governing and political success. In short, as you take over the government, you also need to build a sophisticated political organization to match it. Thanks to your commitment to collaborating with local leaders during your years as Lieutenant Governor, your campaign will be able to leverage a network of supporters and validators in Rhode Island’s 39 cities and towns. Your decades of experience as a state leader and new position as governor will open new doors to meet potential donors and strengthen your political organization.

There are several political hurdles ahead. Your potential primary challengers initially anticipated a non-incumbent race and they currently have a head start building their campaigns and raising money. While we have many advantages—a statewide microphone, visibility in every community, the power of incumbency, etc., we also have much to do to jumpstart fundraising. An important early priority will be forging stronger ties with the Rhode Island Democratic Party. And we will work with you to build from your base in the Blackstone Valley to reach Rhode Islanders of every background. It will take a focused, disciplined, data-driven effort—with a very thoughtful, creative, and targeted advertising effort across mediums—to win this race.

We are excited about the prospect of helping you navigate this challenging period politically and partnering with you on your campaign. For over 20 years, our team at SKDK has handled message and media on six presidential campaigns, elected hundreds of Members of Congress including U.S. Senator Jack Reed, Governors, Mayors and local officials, while also spearheading dozens of winning ballot initiatives and Independent Expenditures. Our staff has worked at all levels of government—from the Biden 2020 campaign, Obama White House, Governors Offices, to City Halls across America—as well as at all levels of political campaigns.

Thank you for inviting us to submit this proposal—we would love to be a part of your campaign team. We want to play a role as your advertising firm, focusing on television and radio, mail, digital advertising, and digital fundraising, while helping you set up the campaign apparatus and navigate this unique political moment. As part of our submission, we have included [a few ads from our archives](#). As you prepare to take office, we are eager to help you shape the plans you already have and bring you fresh ideas, energy, and strategy needed to fight this tough battle and ultimately build a winning campaign. We'd love to help you win this fight—the future of the state is at stake.

WHO WE ARE

SKDK is a full-service firm, providing political strategy, campaign management, communications strategy, media relations, and advertising, among other services. Our firm has a long history of working on Democratic causes and campaigns and we have successfully steered the message, strategy, and advertising on some of the most competitive races in the country. Our team helped Joe Biden win the White House—SKDK Partner Anita Dunn was Biden's chief strategist and led his historic primary turnaround, Vice Presidential selection process, and debate preparations, while our mail team oversaw a program unprecedented in scope that sent out more than 80 million pieces of mail to 14 states. We have extensive experience in local elections, with experience winning tough races both up and down the ballot. SKDK has also been at the forefront of issue and public advocacy campaigns, where we have led independent organizations, legislative initiatives, and ballot measures to victory.

But more than any other level of government, we know how to help gubernatorial candidates win.

Oren Shur, who heads SKDK's political department, has guided governors and their campaigns across the country. Oren previously led the Democratic Governors' Association's Independent Expenditure arm, overseeing nearly \$50 million in advertising across 11 states. In 2018, Oren led Democratic candidate Laura Kelly to an upset win in Kansas, and previously managed Missouri Gov. Jay Nixon's successful campaign. He also served as an advisor to the Biden paid media team in 2020 and as Hillary Clinton's director of paid media, directing the campaign's advertising program—overseeing the creative development and placement for all television, radio, direct mail, digital and newspaper ads in the primary and general elections.

Senior Vice President Devon Puglia has been a top strategist to two governors, two New York City Schools Chancellors, and New York City's chief fiscal watchdog and top mayoral candidate Comptroller Scott Stringer. Previously, in what was the Republican Governors Association's top target race, Devon was a senior adviser to Connecticut Governor Ned Lamont's 2018 victory, overhauling the organization's apparatus and overseeing all communications and policy for the campaign. He previously served as a top adviser to and communications director for Governor Dannel Malloy, overseeing all communications for Connecticut state government and overseeing

100 press staff across 40 different agencies. In one of the closest, toughest races in the nation, he was also communications director on Malloy's 2014 re-election campaign.

Senior Vice President Alex Bloom is a former Massachusetts reporter who has spent nearly a decade working with healthcare companies, colleges, nonprofit organizations, and labor unions to secure high-profile coverage, navigate major crises, and build strategic media campaigns. Beginning in Boston, he helped the Boston Carmen's Union and 1199SEIU United Healthcare Workers East navigate tough fights. Supporting this team will be talented people with expertise in everything from media, to digital advertising, to public affairs (more on this later).

We know campaigns, and as your partner, we will provide guidance for each arm of your reelection. Importantly, we'll take a direct role in helping you set up the apparatus while advising your team on how best to tell your story and approach this pivotal moment in Rhode Island's history.

WHAT WE DO

At SKDK, first and foremost, we are strategists. And we know that every campaign's strategy should be based on its own unique circumstances. However, there are certain core principles that have proven to be effective. We believe in these principles, and we adhere to them:

- **Insights based on research:** Key research is crucial to all campaigns. At SKDK, we ensure that any research tool — from opposition research to polling to focus groups — is designed to both inform the messaging and guide the media strategy. We work closely with polling firms to collaborate so that you receive strong, strategically smart guidance.
- **Honest advice:** Sometimes, the best advice is the advice that no one wants to hear. Tough decisions are always difficult, but at SKDK, we promise to always give guidance that is in your best interests—no matter what.
- **A belief in teamwork:** We believe that successful campaigns are built on collaboration and teamwork, and we will work with the entire organization to ensure the best results.
- **Depth of involvement:** We get involved early, from the first planning meetings and phone calls until the campaign is won. In our experience, it is this level of commitment that is needed to be successful.

We want to be core members of the effort that helps carry Team McKee to victory and be strategic partners in this effort. That means helping to set up the infrastructure, being integrated into the campaign, and supporting the Governor with advice as needed. You will have the full range of our experience available to the campaign, and we want to help your team develop your message and plan a winning strategy. Our specific work on this project would include:

- Strategic political consulting
- Message development
- Creative development of TV, radio and digital ads
- Direct Mail
- Email/Digital Fundraising
- Media buying and tracking of opposition buying
- Web video (introduction or other uses)

OUR PROCESS

Our team has deep experience winning gubernatorial races. We understand how to position the campaign. The most important component of that is a clear message and a smart strategy for paid media.

We are committed to leading a process that develops the sharpest message and produces the very best ads. We would start by meeting with you right away to discuss your background and personal story. We will also want to interview people close to you who can “carry” parts of your story. The best ideas often come from the candidate, their partner, their team and the people who surround you. You are the most important element of what we should share with voters.

We also take defending you seriously, especially as the campaign escalates. With guidance from public opinion research and the budget, we will advise on when to—and when not to—respond to incoming attacks. Simply put, we will not allow the opposition to define you—even if we are being outspent. We also need to develop a smart strategy for engaging, or perhaps not engaging, opponents in the primary. This is a key strategic decision the campaign will need to make.

To lock in some of the most essential elements of the campaign, we will advocate for a planning retreat early on. The retreat should cover all facets of the campaign—messaging, polling, research, fundraising, gubernatorial agenda and overall strategy.

Being integrated into the team as this early stage has various benefits, starting with the creative process. Because we’re a full-service firm, all of the work can be fully integrated and in lockstep both creatively and on message. There are also critical efficiencies—in terms of cost, production and strategic/creative integration—to having the same firm produce and place all of the television and digital video. If we need to edit an ad designed for one digital platform and refit it so that it works for another online platform, we’re able to quickly do that in-house.

OUR SERVICES

As your paid media partner and advisor, we will work closely with you to put in place the critical campaign structures that will be conducive to success. Through our contacts across the Democratic campaign world, we can help you recruit staff and build your team. We will help develop the overall campaign plan, messaging, and strategic timeline; we will join regular calls and meetings to provide consultation and strategic support, and advise on communications strategy. We can also provide debate prep and media training and share guidance on field/GOTV strategy.

TV, DIGITAL AND RADIO ADVERTISING

SKDK takes pride in having produced many of the best award-winning political ads in the country. We believe it’s crucial that ads are well researched and ideas are tested, but they also demonstrate a creative and compelling approach. **Our fully integrated media approach is positioned to deliver you the highest quality advertising with consistent cross-platform messaging.** Effective advertising is the result of an integrated strategic communications plan based on quantitative and qualitative research that is on message, creative, and targeted. In handling both your TV, digital, we deliver high-quality advertising, consistent messaging across mediums and a streamlined process.

In addition, we will consider the gaps in one medium (e.g. hitting frequency on TV in smaller markets) and how to supplement through another medium (e.g. more frequency on digital in those markets targeting key audiences).

When it comes to cross-platform communications, one-size does not fit-all. We don't shoot a 30 second ad and simply cut it down for digital video. We create ads FOR digital that are less reliant on sound, have a more effective immediate hook, the shorter the better, etc.

MEDIA BUYING

Media buying is a critical planning and budgeting tool, and we think we do this better than nearly every firm. SKDK customizes each media plan and advertising flight to reach the right voters on all screens. Whether it is linear television, connected TVs, laptops, tablets or mobile devices, our plans and content are tailored in every way.

We know that every campaign dollar is precious and we ensure that all buys are efficient and highly targeted. We will plan for early reservations and buying to save costs and we will be zealots about tracking the buying patterns of ALL outside groups. There can't be surprises. We need to have all the information available to assess what we're up against and how we can achieve our goals.

FUNDRAISING — TRADITIONAL AND DIGITAL

Using our network, SKDK can work with you to identify a national fundraising consultant.

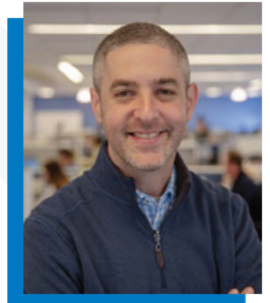
We also have extensive experience in digital fundraising. SKDK has raised more than \$250 million for multiple presidential campaigns, national party committees, senate and gubernatorial campaigns, major political advocacy organizations, and nationally recognized non-profits. Last cycle, our team raised millions online for North Carolina Governor Roy Cooper.

We are confident that our proven strategies can build a customized fundraising program that will increase your supporter base and drive more digital fundraising revenue. The digital fundraising would require an additional monthly fee if it was a service the campaign wanted to pursue.

BIOS

OREN SHUR — MANAGING DIRECTOR, HEAD OF SKDK POLITICAL

Oren is a Managing Director at SKDK and oversees the day-to-day management of the firm's political department. For over 15 years, he has served as a media consultant, campaign manager and communications strategist on some of the most competitive Democratic campaigns and independent expenditures across the country.



In 2020, Oren served as an adviser to the Biden campaign's paid media team. In 2016, he was the Director of Paid Media for Hillary for America, where he directed the campaign's advertising program—overseeing the creative development and placement for all television, radio, direct mail, digital and newspaper ads in the primary and general elections.

Oren has a winning track record not only in blue states, but has also successfully navigated Democratic campaigns in more difficult states like Missouri and Kansas. In 2018, Oren was the lead media strategist and ad-maker for Kansas Gov. Laura Kelly's gubernatorial campaign—a win that U.S. News called "one of the biggest Democratic victories of the night," in a state that Donald Trump carried by over 20 points.

Prior to joining SKDK, Oren served as the Director of Independent Expenditures for the Democratic Governors Association (DGA), where he oversaw paid media programs in 11 states that totaled nearly \$50 million.

He previously served as the Campaign Manager of Missouri Gov. Jay Nixon's successful re-election campaign in 2012—where he oversaw a strategy that required Gov. Nixon win a significant amount of cross-over support from Republicans to defeat a well-funded opponent in a race targeted by both parties.

Oren also previously served as Campaign Manager to New Mexico Lt. Gov. Diane Denish; Communications Director on Missouri Gov. Nixon's successful 2008 campaign for governor; Communications Director to U.S. Sen. Ben Cardin (D-MD); Press Secretary/spokesman on Cardin for Senate in 2006; campaign aide to former U.S. Sen. Barbara Mikulski (D-MD).

A native Marylander, Oren graduated summa cum laude from The George Washington University with a degree in political communication. Oren lives with his wife in Takoma Park, MD.

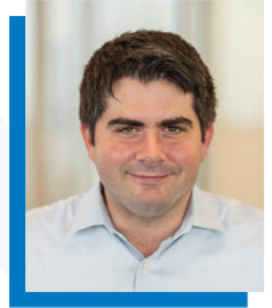
DEVON PUGLIA— SENIOR VICE PRESIDENT

Devon is a veteran communications professional with deep experience across politics, policy and crisis communications.

Prior to joining SKDK, Devon served as communications director for New York City Comptroller Scott Stringer, where he oversaw day-to-day media operations, long-term planning and messaging, speechwriting, and advocacy campaigns across the city.

He previously worked as communications director for and senior staff to Connecticut Governor Dan Malloy, acting as the state's chief spokesperson, managing communications for major national news stories and overseeing nearly 100 people across dozens of agencies. Devon's earlier positions include communications director for the Connecticut Democratic Party, press secretary and head spokesperson for the New York City Department of Education, and video producer for News Corporation's iPad newspaper, The Daily.

A native New Yorker, Devon is a graduate of Occidental College and has a master's from Sydney University.

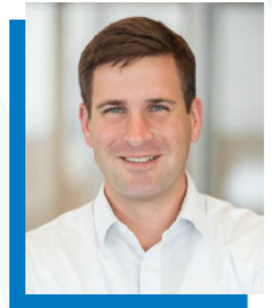


ALEX BLOOM— SENIOR VICE PRESIDENT

As a Senior Vice President at SKDKnickerbocker, Alex advises some of the nation's largest companies and foundations on a range of communications engagements from public affairs outreach to managing internal and crisis communications. He has extensive experience placing stories and securing interviews for corporate, nonprofit, and advocacy clients—outlets include the New York Times, Washington Post, CNN, CNBC, Wall Street Journal, NPR, and USA Today. Alex has experience across multiple industries, from healthcare and higher education, to philanthropy and nonprofits.

Alex joined SKDK in 2017 from Boston-based O'Neill and Associates, where he developed and implemented media strategy for clients in healthcare, financial services, and organized labor. Previously, Alex was a press secretary for two campaign cycles, handling media relations and policy development for Congresswoman Katherine Clark and Warren Tolman's Massachusetts attorney general campaign.

Alex started his career as a newspaper reporter, with stops at the Arizona Republic, The Eagle-Tribune and The Enterprise of Brockton. Alex lives in Brooklyn and he is a graduate of Tufts University.



GRETA FELDMAN – VICE PRESIDENT

Greta is an experienced political operative and is skilled at shaping political, educational, and branding campaigns.

At SKDK, she specializes in advertising and production for political, non-profit and for-profit clients. Her political work includes multiple successful congressional and senate campaigns, IE work, and successful ballot initiatives, including for Senator Jack Reed, Representative Josh Gottheimer, the Democratic Congressional Campaign Committee’s Independent Expenditure, Senate Majority PAC, and the No On C Ballot Initiative. Greta also works closely with advocacy and for-profit clients such as Equity Forward and Campaign for Tobacco-Free Kids, to craft targeted advertising campaigns across the country, utilizing multiple paid media platforms.



Prior to joining SKDK, she worked for the American Sustainable Business Council, where she used her background to help brands like New Belgium Brewing, Patagonia and EILEEN FISHER engage in policy campaigns at the national and state level. Previously, Greta worked across the country for four years on the campaign trail, including on Senator Bennet’s successful election in 2010 and in Colorado’s 3rd Congressional District in 2012.

A native of Brewster, MA, Greta graduated from George Washington University with a degree in political science and economics. She lives in Washington, DC with her husband, Greg and their dog, Andy.

FEES

Like most media firms, we charge a commission on paid media (TV and digital), which starts at 15% on the first two million spent on advertising and 11% thereafter. This includes all strategic consulting, message development, creative of all ads, media budget planning, the placement of all ads and tracking of opposition ads. We bill production at cost and production expenses are pre-approved by the campaign. If the campaign would like us to run the digital fundraising program, that would be billed separately, and we can provide more details and rates upon request.

THANK YOU

Thank you for considering SKDK as a partner. We’re excited about the opportunity and look forward to discussing our approach in more detail at your convenience. For any follow-up questions, please contact:

- Devon Puglia | [REDACTED] | [REDACTED]
- Alex Bloom | [REDACTED] | [REDACTED]

Subject: [Intro] Tony Silva & Julia Rafal-Baer

From: Michael Magee [REDACTED]

Date: 2/23/2021, 8:54 PM

To: Julia Rafal-Baer [REDACTED], Anthony Silva [REDACTED]

Hi Tony,

Per our conversation, I'm introducing you to Julia Rafal-Baer. Julia's consulting firm, Hope Street, provides a wide variety of services to support government on research, planning and implementation of complex projects.

In particular, she would bring deep expertise and relationships to stand up COVID-testing in schools, research and develop the best approach to teacher eligibility for vaccination and support the current advisory group, and to support all aspects of the Governor's school reopening and learning acceleration plans. She can also support personnel recruitment if need be. Julia would play a lead role on all consulting projects you chose to engage Hope Street for. I cannot recommend her highly enough.

Julia, Tony is the Governor's Chiefs of Staff and when the Governor is sworn in will oversee all aspects of RI's pandemic response.

Hope the two of you are able to connect soon. I'm happy to join if that's helpful.

Best,

Mike

Subject: Consulting contract for reopening schools

From: Michael Magee <[REDACTED]>

Date: 2/28/2021, 6:38 PM

To: Dan McKee <[REDACTED]> Anthony Silva <[REDACTED]> Christopher Farrell <[REDACTED]>

BCC: [REDACTED]

Hi Dan, Tony and Chris,

Including you all since I have spoken with each of you about the need for major consulting support on all aspects of reopening schools and accelerating learning for RI students over the next two years.

Julia Rafal-Baer and I worked on this scope over the weekend. As you'll see it's comprehensive. Julia would play the lead role in this personally and Hope Street Consulting would staff the work.

The most urgent priorities are:

- 1) research and planning for teacher vaccination
- 2) COVID testing plans and support for all RI school districts
- 3) Analysis of all federal stimulus support for education and how best to spend it.

But everything else outlined here will soon be upon us as well.

If this looks right and feasible I can have Julia price it and we can discuss how a contract might be swiftly executed so Julia and her team can get to work.

I want to point out now that as with a BCG or McKinsey contract, or the Alvarez contract that's been in the news, none of this is cheap. It would be a contract in the many millions of dollars to support a large staff of consultants. What I can promise is that it would give you the very best team in the country to do this work. My only goal is to put Dan in a position to say he led the nation in fully reopening schools and accelerating learning.

Looking forward to discussing.

Best,

Mike

— Attachments: —

Hope Street Consulting (HSC) RI School Reopening and Addressing Learning Loss in

82.3 KB

**RI School Reopening & Addressing Learning Loss in RI
Menus of Services and Activities
25 February 2021**

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<u>Addressing Learning Loss due to COVID-19</u>	5-6
<u>Higher Education Pooled Testing</u>	7

School Reopening for K-12	
Teacher vaccination model research	During the planning phase of the project, Hope Street Consulting (HSC) will conduct research on existing vaccination models for teachers and school staff from other states who have finalized planning for and/or implemented school vaccinations. HSC will produce a summary report of potential models from various states and analysis of their potential replication viability in Rhode Island.
Project management	<p>HSC will serve as the lead project manager for school reopening in Rhode Island. Project management will include organization, prioritization, and communication of all major project components.</p> <p>HSC will coordinate communication and convenings between state and involved districts, lead organizations, and/or consultants, including scheduling and leading project meetings, drafting memos and summary documents, and coordinating the slide decks creation, in accordance with appropriate timelines and project scope.</p>
Strategic advising and cabinet coaching	<p>HSC will provide strategic advising to the RI governor and the RIDE commissioner, as well as executive coaching and support to the governor's and commissioner's cabinets with regards to school reopening and related activities. HSC will serve as a thought partner for the organizations' leaders, increasing skillsets, competencies, and project-specific knowledge through targeted feedback cycles and coaching conversations.</p> <p>Additionally, HSC will provide ad hoc technical assistance during the planning phase and tenure of the project on an ongoing and as needed basis. Responsive to project challenges and unknown variables, HSC will provide immediate assistance and advise the state and/or districts on unforeseen components and/or issues related to school reopening.</p>
Stimulation plan funding analysis	HSC will lead an analysis of how Rhode Island's portion of \$130 billion allocated to K - 12 education in President Biden's COVID relief package should be spent so that it will lead to the greatest impact for students and schools. Focused on safely reopening and addressing learning loss, HSC will provide advising on how the funds should be divided, who/what they should be divided between, how they should be dispersed, and how they should be spent.

<p>Program design and evaluation</p>	<p>Working closely with RIDE, HSC will lead school reopening design for RIDE and program partners to codify goals, outcomes, strategies, and activities that will be necessary for the successful launch and execution within RI districts and schools. HSC program design services may include developing a theory of action, identifying organization capacities and key leaders, designing implementation scenarios specific to reopening and testing in the RI K-12 environment, and defining and detailing program components.</p> <p>Via informational sessions and trainings for RI superintendents, HSC will utilize “day in the life of” (DILo) case studies - including those specific to diagnostic testing, screening testing using rapid tests, screening testing using molecular PCR, and screening testing using pooled PCR tests - to inform districts of testing program options and assist them in determining the best course of action specific to their district with regards to testing strategies.</p> <p>HSC will provide advice on the implementation of the chosen testing method and potential need for student and staff testing consent forms and tracking mechanisms of consent materials, as well as information documents related to consent policies and requirements.</p> <p>To assess program efficacy, HSC will design and conduct ongoing analysis and benchmark data reporting that will allow the RI Office of the Governor, RIDE, the RI Dept. of Health, and other entities to make informed decisions regarding reopening and testing. Formative evaluations will seek to understand the root causes of any problems, benchmark against project goals and desired outcomes, increase coherence across involved parties, and lead to program components being implemented with fidelity. HSC will also produce a summative evaluation of school reopening and associated initiatives (such as pooled testing, vaccinations, etc.) to communicate its successes and effectiveness to the larger community.</p>
<p>Policy development</p>	<p>In collaboration with the RI Dept of Health and other key stakeholders, HSC will conduct research and leverage existing evidence to inform creation of school reopening policies specific to RIDE and applicable districts/schools. Needed policies may include those related to coronavirus test administration, vaccinations, school/student prioritization, student and staff privacy, quarantine and isolation, notification, and other key topics.</p> <p>In addition to school reopening policies, HSC may produce related policy briefs that may be utilized at the school, district, and state level regarding the implementation and ongoing execution of reopening.</p>

<p>Stakeholder communications and engagement</p>	<p>HSC will lead communications for school reopening, along with creating stakeholder engagement process, to achieve an end goal of increasing understanding of, participation in, and support of reopening, vaccinations, pooled testing, teacher vaccinations, and other state initiatives within schools and districts.</p> <p>The critical partners that communications and engagement efforts will reach include district leaders, students and families, educators, policymakers, health experts, elected and community leaders, medical professionals, and funders.</p> <p>As appropriate to the audience, HSC may create and/or support informational flyers, webinars, one-pagers, websites/pages, memos, and/or presentations. HSC may also draft talking points and other forms of communication for the governor, her executive cabinet, the RIDE commissioner, and/or her executive staff, and provide these individuals communications coaching and support as appropriate to school reopening.</p>
<p>Implementation support</p>	<p>HSC can also provide ongoing implementation support in the event that the state and/or districts do not have current staff capacity to lead this work.</p> <p>HSC implementation support may include articulating specific resource needs, developing and updating cross-team project plans and timelines, monitoring key performance indicators and milestones so that real-time adjustments can be made.</p>

Addressing Learning Loss due to COVID-19	
Strategic planning	HSC will support the state and/or districts in creating a strategic plan to address learning loss due to COVID-19. The strategic plan will serve as a foundational document in addressing learning loss by being a comprehensive framework utilized in decision-making, resource allocation, and targeting differentiated support that improves state and district performance.
Municipal education offices	HSC will provide guidance on creating municipal education offices within RI to assist districts and their constituents. Additionally, HSC will advise on the operation of the newly created education offices and how to best utilize and leverage them to address student learning loss and promote workforce development.
Equity review and initiatives	HSC will conduct an equity audit to examine the impact of the learning loss plan on the most vulnerable students from an academic, operational, and communications perspective, as well as a process for monitoring implementation of reopening plans. The review will encompass academic programs, curricula, instruction, interventions, and related services components, using research-based protocols to ensure a thorough and fair analysis of programs and plans as they relate to student subgroups. The equity review will include actionable recommendations for programmatic improvements and compliance management.
Accountability services	HSC will develop frameworks and recommendations for evaluation and accountability system changes for short-term application while schools and districts are addressing learning loss challenges.
Learning loss program design and evaluation	Utilizing state and district data, HSC will lead learning loss program design for RIDE and district partners to codify goals, outcomes, strategies, and activities that will be necessary for the mitigating and overcoming learning loss in RI districts and schools. Program components may include extended and/or additional learning time efforts, student tracking systems, early-warning systems, and other research-based strategies. HSC will design and conduct progress monitoring and formative evaluations that will demonstrate program impact at the student, subject, school, and district levels. A summative evaluation report will be generated to determine overall findings and program successes.

<p>Implementation support</p>	<p>An implied and essential part of successful project execution, HSC will provide ongoing implementation support in the event that the state and/or districts do not have current staff capacity to lead the implementation of learning loss programs.</p> <p>HSC implementation support may include articulating specific resource needs, developing and updating cross-team project plans and timelines, monitoring key performance indicators and milestones so that real-time adjustments can be made.</p>
-------------------------------	---

Higher Education Pooled Testing	
Start-up planning	HSC will conduct a needs assessment and determine project feasibility at the specific college or university, given the entity's size, student body makeup, commuter population, participation rate in sports and extracurriculars, and operating policies and regulations.
Project management	<p>HSC will serve as the lead project manager for standing up pooled testing for the RI Office of Higher Education, public colleges and universities, and private colleges and universities. Project management will include organization and communication between participating higher ed institutions, with an ultimate goal of consistency and cross-school collaboration.</p> <p>HSC will coordinate communication and convenings between the Office of Higher Education, public and private college/university leaders and departments, external partners, and health system, including scheduling and leading project meetings, drafting memos and summary documents, and coordinating the slide decks creation, in accordance with appropriate timelines and project scope.</p>

Subject: Re: Consulting contract for reopening schools

From: Michael Magee <[REDACTED]>

Date: 3/1/2021, 10:13 PM

To: Dan McKee <[REDACTED]>

CC: Anthony Silva <[REDACTED]> Christopher Farrell <[REDACTED]>

Dan, Tony and Chris,

I worked with Julia and her team to get some clarity on a two-year consulting budget, much of which would be executed in the first 12 months, though important work on the Governor's education agenda would extend into year two. Julia would lead this project herself full-time with a team dedicated to the management of the overall project and three additional project teams. The total cost of the proposal is approximately \$12M: \$9M in year 1 and \$3M in year 2. I've attached an itemization by project and year.

For context, I was able to get some information on the Alvarez and Marsal contract and I have copied that below. The contract Julia and Hope Street Consulting are proposing provides significantly greater return on investment, it seems to me.

In terms of strategy for executing a contract, my understanding is there are two options:

1. An emergency contract.
2. A very fast RFP with a very fast turnaround -- e.g. 10 days. This could be quite specific - i.e. winning vendor must be able to do turnaround of 12 hours and must live in R.I. and must have experience with operationalizing education and health for at least 15 school districts and more than 6 states. (That's apparently how Alvarez contract started as well as a contract with Salesforce.) Hope Street group would qualify under parameters like that.

My only goal here is to ensure Dan leads the nation in school reopening and learning acceleration over the next two year and I think this contract would go a long way towards ensuring that.

Can we find 30-60 mins tomorrow to discuss?

Best,

Mike

Rhode Island

Contracts with Alvarez & Marsal

1 March 2021

Rhode Island signed an initial contract with Alvarez & Marsal in June 2020 and a second in September 2020. Combined, the contracts totaled nearly \$12.4 million:

- \$6,448,000 for COVID vaccination support for the Department of Health
- \$4,344,000 for COVID testing support

- \$1,590,000 for “budgeting and financial controls” work (that is not eligible for FEMA reimbursement)

Payments made to Alvarez & Marsal (from June 2020 to present) are below. To date, Rhode Island has paid the firm almost \$4 million in expenses related to COVID-19.

Not directly related, but of note:

- Alvarez & Marsal also have a [separate contract](#) in place (since November 2019) to provide CPA supports (\$30,000 per week for 16 weeks) and CPA services (\$37,000 per week for 16 weeks), totaling over \$1.1 million.
- Alvarez & Marsal were awarded a contract by the Rhode Island Council on Postsecondary Education to assist Rhode Island College address its budget deficit due to effects of coronavirus. Initially intended to last from December 14, 2020 through February 28, 2021, Alvarez & Marsal would have earned \$76,000 per week. The Department of Administration [ended the contract early](#) on January 14, 2021.

On Mon, Mar 1, 2021 at 4:18 PM Michael Magee <[REDACTED]> wrote:

Should have a good estimate for you later today. Wanted to confirm that the scope was right and am working with Julia to properly cost out.

On Mon, Mar 1, 2021 at 9:32 AM Dan McKee <[REDACTED]> wrote:

Thanks Mike
How many millions?

Sent from my iPhone

> On Feb 28, 2021, at 6:39 PM, Michael Magee <[REDACTED]> wrote:

>

>

> Hi Dan, Tony and Chris,

>

> Including you all since I have spoken with each of you about the need for major consulting support on all aspects of reopening schools and accelerating learning for RI students over the next two years.

>

> Julia Rafal-Baer and I worked on this scope over the weekend. As you'll see it's comprehensive. Julia would play the lead role in this personally and Hope Street Consulting would staff the work.

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> 2) COVID testing plans and support for all RI school districts

> 3) Analysis of all federal stimulus support for education and how best to spend it.

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> I want to point out now that as with a BCG or McKinsey contract, or the Alvarez contract that's been in the news, none of this is cheap. It would be a contract in the many millions of dollars to support a large staff of consultants. What I can promise is that it would give you the very best team in the country to do this work. My only goal is to put Dan in a position to say he led the nation in fully reopening schools and accelerating learning.

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> Looking forward to discussing.

>

> Best,

>

> Mike

>

>

>

>

>

> <Hope Street Consulting (HSC) RI School Reopening and Addressing Learning Loss in RI.pdf>

Attachments:

RI Project Quote.pdf

50.1 KB

RI Contract

From: Devon Puglia <[REDACTED]>
To: Julia Rafal-Baer <[REDACTED]>
Date: Mon, 01 Mar 2021 09:58:50 -0500
Attachments: Chiefs for Change SKDK Agreement No3 Rhode Island Communications Support Project TAC
2182021.docx (1.72 MB)

Julia –

Attached is a contract for RI work – similar to the ones we've signed in the past. Let us know if you have any questions or if you'd like me to work directly with Cerena on this.

Thanks so much!

Timeframe 2 [Years]

	Year 1	Year 2
Strategic Management and Oversight		
Personnel - 4 employees at 100%, portion of 5 employees time	\$1,867,450	\$1,867,450
School Reopening for K-12	\$4,862,529	0
<i>Teacher vaccination model research</i>		
<i>Project management</i>		
<i>Strategic advising and cabinet coaching</i>		
<i>Stimulation plan funding analysis</i>		
<i>Program design and evaluation</i>		
<i>Policy development</i>		
<i>Stakeholder communications and engagement</i>		
<i>Implementation support</i>		
Addressing Learning Loss due to COVID-19	\$554,840	\$1,300,000
<i>Strategic planning</i>		
<i>Municipal education offices</i>		
<i>Equity review and initiatives</i>		
<i>Accountability services</i>		
<i>Learning loss program design and evaluation</i>		
<i>Implementation support</i>		
Higher Education Pooled Testing	\$1,815,840.00	0
<i>Start-up planning</i>		
<i>Project management</i>		
	\$9,100,659.00	\$3,167,450.00

Re: RI Contract

From: Devon Puglia <[REDACTED]>
To: Julia Rafal-Baer <[REDACTED]>
Date: Tue, 02 Mar 2021 10:25:20 -0500

Just so I'm clear — you prefer this to say 75k as a project based fee for the time period, instead of 15k/monthly for five months. Is that right?

Sent from my iPhone

On Mar 2, 2021, at 9:57 AM, Julia Rafal-Baer <[REDACTED]> wrote:

Hi Devon - thank you so much for this. We currently have a \$75k budget - can we please just change this to be \$75k for the time period and not a retainer?

On Mon, Mar 1, 2021 at 9:58 AM Devon Puglia <[REDACTED]> wrote:

Julia –

Attached is a contract for RI work – similar to the ones we've signed in the past. Let us know if you have any questions or if you'd like me to work directly with Cerena on this.

Thanks so much!

Re: RI Contract

From: Devon Puglia <[REDACTED]>
To: Julia Rafal-Baer <[REDACTED]>
Date: Tue, 02 Mar 2021 10:29:20 -0500

Sorry — I see now. This says 6 months at 15k instead of 5 months at 15k, which would total 75k. Will adjust accordingly. My mistake

Sent from my iPhone

On Mar 2, 2021, at 10:25 AM, Devon Puglia <[REDACTED]> wrote:

Just so I'm clear — you prefer this to say 75k as a project based fee for the time period, instead of 15k/monthly for five months. Is that right?

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To: Devon Puglia [REDACTED] >
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Julia –

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Thanks so much!

Subject: RFI for School Reopening

From: Michael Magee

Date: 3/3/2021, 8:16 PM

To: Dan McKee

CC: Anthony Silva

Christopher Farrell

Hi all,

I edited the RFI I received from DOA to reflect all the needs we discussed and a quick turnaround time (3/12).

Ideally this would go to DOA tomorrow in the interest of quick turnaround and beginning the urgent work.

I'm just guessing at this and am sure DOA can be helpful in getting it exactly right. Happy to talk to anyone there if that would help speed things along. Let me know if there's anything else you need me to do.

Best,

Mike

—Attachments:—

rfi-RIschools.3.3.21.docx

134 KB



Solicitation Information
[Date]

RFI#

TITLE: ...

SUBMISSION DEADLINE: March 12, 2001 at 12pm ET

Questions concerning this solicitation must be received by the Division of Purchases at @purchasing.ri.gov no later than **March 12, 2001 @ 12pm ET**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the **RFI#** on all correspondence. Questions received, if any, will be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

Buyer Name, Title

Applicants must register on-line at the State Purchasing Website at www.ridop.ri.gov

Note to Applicants:

Responses received without a completed RIVIP Bidder Certification Cover Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION COVER FORM

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SECTION 1. INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the The Office of the Governor, is soliciting informational responses from qualified firms to provide comprehensive school reopening support along with technical assistance in accelerating learning for Rhode Island students to Rhode Island local education agencies (LEAs). For the purposes of this request a qualified firm is defined as one with experience operationalizing education and health initiatives in at least fifteen school districts and more than six states and that can begin the project within twelve hours of approval, in accordance with the terms of this Request for Information and the State's General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases' website at www.purchasing.ri.gov.

Instructions and Notifications to Offerors:

1. Potential vendors are advised to review all sections of this RFI carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the response.
2. The State invites comments, suggestions and recommendations from potential vendors and other interested parties on any questions or issues raised in this RFI. Please note it is not a requirement to answer all questions.
3. Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFI are solicited.
4. This is a Request for Information ("RFI"), and as such no award will be made as a result of this solicitation.
5. All costs associated with attending the pre-solicitation conference and/or developing or submitting responses to this RFI, or providing oral or written clarification of the content of a response shall be borne by vendors. The State assumes no responsibility for any costs.
6. Responses misdirected to other locations, or which are otherwise not present in the Division of Purchases at the above stated date/time of opening for any cause will be determined to be late and shall not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the Division of Purchases.
7. Vendors are advised that all materials submitted to the State for consideration in response to this RFI shall not be considered to be public records as defined in Title 38, Chapter 2 of the General Laws of Rhode Island unless and until there is a contract award through a subsequent, related procurement.
8. Interested parties are instructed to monitor the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released as addenda.

SECTION 2. REQUEST FOR INFORMATION

This RFI outlines the type of information being solicited and response structure requested from potential respondents.

A. Background

The State is considering issuance of a Request for Proposals (“RFP”) from qualified vendors to provide comprehensive school reopening support along with technical assistance in accelerating learning for Rhode Island students to Rhode Island local education agencies (LEAs) Some of the goals of the upcoming RFP will be to:

- Support the Office of the Governor, Department of Health, Department of Education, LEAs and other relevant agencies in developing a coherent approach to vaccinating teachers and other essential schools staff and overcoming any vaccine hesitancy among teachers and school staff through effective communications.
- Support Rhode Island LEAs to design and implement approaches to COVID testing for all teachers, staff and students, in coordination with relevant offices and agencies.
- Provide project management support of all aspects of school reopening including strategic advising to Rhode Island Department of Education, analysis of all COVID relief funding, program design and evaluation, policy development, stakeholder communications and engagement and implementation support.
- Support design and implementation of Rhode Island plan to address student learning loss, including: strategic planning, the use of municipal education offices, equity audits, accountability services, learning loss program design and evaluation and implementation support.

B. RFI Response

The following outline is intended to standardize and structure responses for ease of analysis. *Do NOT include a cost proposal with the RFI response as cost shall not be considered with this RFI.*

- Response to the requirements outlined in Section 2.A.

SECTION 3. QUESTIONS

Questions concerning this solicitation must be e-mailed to the Division of Purchases at@purchasing.ri.gov no later than the date and time indicated on page one of this solicitation. No other contact with State parties is permitted. Please reference **RFI# xxxxx** on all correspondence. Questions should be submitted in writing in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases’ website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related

postings such as addenda. If technical assistance is required, call the Help Desk at (401) 574-8100.

SECTION 4. RESPONSE CONTENTS

A. Responses shall include the following:

1. One completed and signed RIVIP Bidder Certification Cover Form (included in the original copy only) downloaded from the Division of Purchases website at www.ridop.ri.gov. *Do not include any copies in the response.*
2. Response - describing the requirements and concept for this potential project, and all information described earlier in this solicitation. The response is limited to six (6) pages.
 - a. One (1) Electronic copy on a CD-R, marked "Response - Original".
 - b. One (1) printed paper copy, marked "Response -Original" and signed.
 - c. Four (4) printed paper copies

B. Formatting of proposal response contents shall be as follows:

1. Formatting of CD-Rs – Separate CD-Rs are required for the technical proposal and cost proposal. All CD-Rs submitted must be labeled with:
 - a. Vendor's name
 - b. RFI #
 - c. RFI Title
 - d. If file sizes require more than one CD-R, multiple CD-Rs are acceptable. Each CD-R must include the above labeling and additional labeling of how many CD-Rs should be accounted for (e.g., 3 CD-Rs are submitted for a technical proposal and each CD-R should have additional label of '1 of 3' on first CD-R, '2 of 3' on second CD-R, '3 of 3' on third CD-R).

Vendors are responsible for testing their CD-Rs before submission as the Division of Purchase's inability to open or read a CD-R may be grounds for rejection of a Vendor's proposal. All files must be readable and readily accessible on the CD-Rs submitted with no instructions to download files from any external resource(s). If a file is partial, corrupt or unreadable, the Division of Purchases may consider it "non-responsive". USB drives or other forms of electronic media shall not be accepted. Please note that vendor CD-Rs shall not be returned.

2. Formatting of written documents and printed copies:
 - a. For clarity, the response shall be typed. These documents shall be single-spaced with 1" margins on white 8.5"x 11" paper using a font of 12 point Calibri or 12 point Times New Roman.
 - b. All pages on the response are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments.

The Vendor's name should appear on every page, including attachments. Each attachment should be referenced appropriately within the response section and the attachment title should reference the response section it is applicable to.

- c. Printed copies are to be only bound with removable binder clips.

SECTION 5. RESPONSE SUBMISSION

Interested vendors must submit responses to provide information covered by this RFI on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases, shall not be accepted.

Responses should be mailed or hand-delivered in a sealed envelope marked "RFI# xxxxxx" to:

RI Dept. of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, RI 02908-5855

SECTION 6. DISCLAIMER

This Request for Information is solely for information and planning purposes and does not constitute a request for proposal or an invitation to bid. All information received in response to the RFI and marked as "Proprietary" shall be deemed to be confidential but may still be subject to disclosure pursuant to the Rhode Island "Access to Public Records Act, R. I. Gen. Laws § 38-2-1, *et seq.* . Responses to the RFI will not be returned.

END

Adesuyi, Doris (GOV)

From: Dube, Tabatha (LTGOV)
Sent: Wednesday, March 3, 2021 1:52 PM
To: [REDACTED] McCabe, Brenna M (GOV)
Subject: FW: [EXTERNAL] : 3pm meeting with Governor

Good Afternoon,

Please see the meeting invitation below for today at 3pm with Governor McKee.

Best,
Tabatha

Ms. Tabatha Dube

Office of Governor Daniel J. McKee, State of Rhode Island

Statement of Confidentiality: The contents of this e-mail message and any attachments are confidential and are intended solely for the addressee. The information may also be legally privileged. If you have received this transmission in error, any use, reproduction, or dissemination of this transmission is strictly prohibited. If you are not the intended recipient, please notify the sender by reply e-mail and delete the message.

From: Michael Magee <[REDACTED]>
Sent: Wednesday, March 3, 2021 1:49 PM
To: Dan McKee <[REDACTED]>; Anthony Silva <[REDACTED]>; Julia Rafal-Baer <[REDACTED]>; McCarthy, Thomas (RIDOH) <[REDACTED]>; P Rodriguez <[REDACTED]>; Dube, Tabatha (LTGOV) <[REDACTED]>
Subject: [EXTERNAL] : 3pm meeting with Governor

Hi everyone, please see details below for our 3pm meeting with the Governor.

Tabatha, hoping you can forward to Brenna McCabe and Lisa Baldelli Hunt.

Mike

Mike Magee is inviting you to a scheduled Zoom meeting.

Topic: Mike Magee's Zoom Meeting
Time: Mar 3, 2021 03:00 PM Eastern Time (US and Canada)

[REDACTED]

Meeting ID: [REDACTED]
Passcode: [REDACTED]
[REDACTED]

Dial by your location
[REDACTED] (Washington DC)

Re: RI Contract

From: Devon Puglia <[REDACTED]>
To: Julia Rafal-Baer <[REDACTED]>
Date: Thu, 04 Mar 2021 20:12:59 -0500
Attachments: Chiefs for Change SKDK Agreement No3 Rhode Island Communications Support Project TAC
2182021[66]_v2.docx (3.17 MB)

Here's the adjustment to the contract so that it has the correct number of months, totaling \$75k. Thanks so much.

From: Devon Puglia <[REDACTED]>
Date: Monday, March 1, 2021 at 9:58 AM
To: Julia Rafal-Baer <[REDACTED]>
Subject: RI Contract

Julia –

Attached is a contract for RI work – similar to the ones we've signed in the past. Let us know if you have any questions or if you'd like me to work directly with Cerena on this.

Thanks so much!



CONSULTING AGREEMENT No3
Rhode Island Communications Support Project

AGREEMENT between SKDKnickerbocker LLC, a Delaware limited liability company ("SKDK") and Chiefs for Change ("Client").

W I T N E S S E T H:

WHEREAS, Client desires to avail itself of the expertise and consulting services of SKDK and SKDK desires to make his/her expertise and consulting services available to Client upon the terms and conditions hereinafter set forth;

NOW, THEREFORE, in consideration of the agreements herein contained, the parties agree as follows:

1. CONSULTING SERVICES. SKDK hereby agrees to perform the following media relations consulting services during the term of this Agreement:

- (a) Strategic communications consulting services associated with to be performed by SKDK are described in the SKDK SOW attached hereto and labeled as Exhibit A

The above stated services shall be referred to herein as the "Services."

2. TERM OF AGREEMENT. The term of this Agreement shall begin on January 5, 2021 and shall end on June 7, 2021. Termination may occur at any time, at the discretion of either Client or SKDK, upon thirty (30) days written notice to the other.

3. COMPENSATION. SKDK shall receive a consulting fee of fifteen thousand dollars (\$15,000.00) per month in exchange for SKDK's provision of the Services to Client as outlined in Section 1 above. Payment shall be due to SKDK from Client upon Client's receipt of an applicable invoice.

4. EXPENSES. Client shall be responsible for the repayment of SKDK's expenses directly attributable to SKDK's Services to be provided hereunder. SKDK

shall obtain prior written approval (email is acceptable) from Client prior to incurring any expenses for out-of-town travel. All other expenses over \$500.00 shall also have prior approval. Client shall reimburse SKDK for such expenses within thirty (30) days of SKDK providing to Client a receipt for the expenses incurred along with a description of the incurred expense and any other information reasonably requested by Client regarding such expenses.

5. CONFIDENTIALITY.

(a) The SKDK acknowledges that all information acquired by the SKDK relating directly or indirectly to the present or contemplated business and affairs of the Client and its sponsors, donors, beneficiaries, and/or clients as well as such all other non-public information of the Client ("Confidential Information"), is a valuable, special, and unique asset of the Client and its members/stakeholders and is to be held in trust by the SKDK for the Client's and its stakeholders sole benefit. The SKDK shall not, at any time during or after the term of this Agreement, use for it/him/herself or others, or disclose or communicate to any person for any reason, any Confidential Information without the prior written consent of the Client. The SKDK shall return or destroy (as directed by the Chief Executive Officer or authorized agent) all Confidential Information made available under this Agreement, including copies of such Confidential Information, upon the first to occur of (a) completion of the Services or (b) request by the Client.

(b) Without limiting subsection (a) in any way, SKDK expressly agrees that it will not disclose to any third-party financials, protected data and metrics of the Client. SKDK acknowledges that this provision is a material term of this Agreement.

(c) SKDK warrants that it has in place measures and procedures to ensure the security of Client's Confidential Information and to prevent its disclosure in violation of the terms of this Agreement.

(d) Should the SKDK receive a subpoena directing disclosure of any Confidential Information, the SKDK shall immediately inform the Client and cooperate fully with the Client in responding to the subpoena.

(e) All originals, copies and summaries of manuals, memoranda, notes, notebooks, records, reports, plans, drawings, and other documents or items of any kind concerning any matters affecting or relating to the present or contemplated business and affairs of the Client and its beneficiaries/clients, whether or not they contain Confidential Information, are and shall continue to be the property of the Client and its beneficiaries/clients, and all of such documents or items in the actual or

potential possession or control of the SKDK shall be delivered to the Client by the SKDK immediately upon termination of this Agreement.

6. INDEPENDENT CONTRACTOR. SKDK shall perform consulting services pursuant to this Agreement as an independent contractor with respect to Client, and nothing in this Agreement shall create, or be deemed to create, any relationship of employer and employee or of master and servant between Client and SKDK. As an independent contractor, SKDK is responsible for payment of all applicable obligations to state and/or federal governmental agencies, including, but not limited to, income tax, unemployment tax, business registration fees, etc. Client and SKDK agree that SKDK may provide independent consulting services to other individuals or entities.

7. INDEMNIFICATION.

(a) Should one party (the “Indemnified Party”) incur or suffer any liability, damage, or expense, including reasonable attorney’s fees, regarding the defense of a legal proceeding brought by a third party arising out of the negligence or breach of this Agreement by the other party (the “Indemnifying Party”), then the Indemnifying Party shall indemnify and hold harmless the Indemnified Party for such liability, damage, or expense.

(b) The obligations set forth in this Section 7 shall survive indefinitely the termination of this Agreement.

8. ASSIGNMENT. Neither this Agreement nor any right or obligation arising hereunder may be assigned or delegated in whole or in part by either Party, whether expressly or by operation of law, without the prior written consent of the other Party. Any assignment or delegation of this Agreement and/or its rights, benefits and obligations that is attempted without any consent required hereunder shall be of no force or effect and shall constitute a material breach of this Agreement. This Agreement will be binding on and inure to the benefit of the successors and permitted assigns of the Parties.

9. GOVERNING LAW; CAPTIONS. This Agreement contains the entire agreement between the parties and shall be governed by the law of the District of Columbia. It may not be changed orally, but only by agreement in writing signed by the party against whom enforcement of any waiver, change, modification or discharge is sought. Section headings are for convenience of reference only and shall not be considered a part of this Agreement.

10. ARBITRATION. Any dispute arising out of this Agreement shall be submitted to binding arbitration administered by JAMS pursuant to its Streamlined Arbitration Rules and Procedures. The arbitration shall take place in Washington DC, before one arbitrator. The arbitrator shall award to the prevailing party the costs of the arbitration, including compensation for the arbitrator and attorneys' fees, to the prevailing party. The decision of the arbitrator shall be final and binding and may be entered as a judgment in any court having jurisdiction.

11. CONTACT PERSONS.

(a) Client designates Julia Rafal-Baer ("Client Contact") as SKDK's primary contact. SKDK shall direct all reports, notices, invoices, inquiries and other communications to Julia Rafal-Baer at:

Email: [REDACTED]
[REDACTED] (invoice only)
Phone: [REDACTED]

(b) SKDK designates Devon Puglia ("SKDK Contact") as Client's primary contact. Client shall direct all notices, inquiries, and other communications to Devon Puglia at:

Email: [REDACTED]

12. INSURANCE. SKDK warrants that it shall maintain sufficient insurance coverage to enable it to meet its obligations created by this Agreement and by law. Without limiting the foregoing, SKDK warrants that such insurance shall include the following lines of coverage (with minimum limits of \$1,000,000 per occurrence): Commercial Liability, Workers' Compensation (statutory limits), Advertisers Liability, and Employer's Liability.

WHEREAS, SKDK and Client agree by their duly authorized representative as of the day and year below.

SKDKNICKERBOCKER LLC

CHIEFS FOR CHANGE

By: _____

By: _____

Print: _____

Print: _____

Title: _____

Title: _____

Date: _____

Date: _____

Signature page to consulting agreement

EXHIBIT A

MEMORANDUM

To: Julia Rafal-Baer and Michael Magee Jr.

From: Devon Puglia and Alex Bloom, SKDKnickerbocker

Date: January 14, 2021

Re: Rhode Island Communications Support

OVERVIEW

With the selection of Rhode Island Governor Gina Raimondo as the next Commerce Secretary, the months ahead are critical to the future of education policy in the state. At a time when the nation is battling a historic pandemic that has threatened public health, crippled the economy, and put a spotlight on schools, there are many questions swirling around education policy, the vaccine, and whether schools can and should be open. Put simply, Rhode Islanders as well as its children can't afford new hurdles that impede the growth of high-quality new schools and put the education ecosystem in jeopardy. Public charter schools, sound education policies, and children themselves who rely on new school options are depending on continued success. We must continue to protect the education progress that's already been made so far and ensure the expansion of high-quality charter schools across Rhode Island for years to come.

We know education policy like no other public affairs firm in the nation, and at this moment for Rhode Island, the education ecosystem in Rhode Island needs someone thinking about its future and what that future holds. We are prepared to play that role.

OUR STRATEGIC OBJECTIVE

To support the education ecosystem in Rhode Island by helping to cultivate a media and political environment that is conducive to continued educational progress, provide

political and legislative guidance to overcome efforts to curb the growth of public charter schools, and develop communications strategies to help further our overall educational agenda.

DELIVERABLES

Through a five-month project, this scope of work would include:

- Being a strategic communications adviser to the education ecosystem on politics, planning, messaging, and media tactics
- Supporting communications for the education ecosystem around the vaccine, educators, and schools
- Providing strategic guidance around a new legislative bill that would put a moratorium on new public charter schools and monitoring for changes in education policy
- Conducting comprehensive news and social media monitoring around education in Rhode Island
- Drafting surrogate talking points, op-eds, and other communications in support of our agenda

BUDGET

To execute this scope for five months, SKDK would charge a retainer of \$15,000 per month.

THANK YOU

For any follow-up questions, please contact:

- Alex Bloom | [REDACTED]
- Devon Puglia | [REDACTED]

Subject: Call with Tony Silva, Director Jim Thorsen, Nancy McIntyre, Julia Rafal-Baer, Michael Magee, Jr.

From: "Schedule, Gov (GOV)" [REDACTED]

Date: 3/5/2021, 9:38 AM

To: "McKee, Daniel (LTGOV)" [REDACTED] "Silva, Anthony (GOV)"

[REDACTED], "Thorsen, James (DOR)" [REDACTED]

"McIntyre, Nancy (DOA)" [REDACTED]

CC: "Aieskoll, Alice (DOA)" [REDACTED]

"Dube, Tabatha (LTGOV)" [REDACTED]

"Connors, Kelley (DOA)" [REDACTED]

► Schedule, Gov (GOV) has invited you to Call with Tony Silva, Director Jim Thorsen, Nancy McIntyre, Julia Rafal-Baer, Michael Magee, Jr.

Participant one-tap: 1-866-722-4574,,82485484#

Conference Line: 866-722-4574

Participant PIN: 82 485 484

Fwd: statement & contracts going to media - for your awareness

From: "Thorsen, Jim (DOA)" [REDACTED] >
Date: Fri, 05 Mar 2021 19:46:26 -0500

Stark

Get [Outlook for iOS](#)

From: Licht, Jeremy (DOA) [REDACTED] <[REDACTED]>
Sent: Friday, March 5, 2021 7:26:36 PM
To: Thorsen, Jim (DOA) <[REDACTED]>
Subject: Fwd: statement & contracts going to media - for your awareness

This is a summary of the A&M contracts as of January.

The State has two active contracts with Alvarez & Marsal -- one with BHDDH to support the redesign and transition of Eleanor Slater Hospital, totaling \$2,064,400, and the other providing various services during the State's COVID-19 response, totaling \$11,572,000 at this time.

The pandemic has forced governments across the country to create and run complex systems, from testing and vaccine administration to the processing of unemployment benefits and distribution of grants, in a matter of days and weeks. While the federal government has provided financial assistance, it has not provided a strategic roadmap on how to develop and effectively administer these complex systems.

State employees have worked hard and been committed throughout the pandemic, yet additional support has been necessary because of the unprecedented challenges presented by the pandemic. In order to meet these demands, the State has contracted with Alvarez & Marsal to provide necessary and timely support to ensure Rhode Island meets its ambitious testing goals, maximizes the value of every dollar in federal aid, and administers the vaccine to as many Rhode Islanders as quickly and carefully as possible.

Current Contracts with Alvarez & Marsal	Amount \$	FEMA Eligible?
COVID Vaccination Support	6,448,000	Yes
COVID Testing Support	3,864,000	Yes
Budgeting and Financial Controls	1,260,000	No
Total	11,572,000	

To date, the agreement totals \$11,572,000, with the option for two extensions. Of this total, \$6,448,000 is allocated for vaccination support, \$3,864,000 for testing support, and \$1,260,000 for budgeting and financial controls.

Based on current FEMA guidance, the State will submit for reimbursement the costs associated with the testing and vaccination support (\$10,312,000) provided by Alvarez & Marsal. If approved, the federal government will cover \$7,734,000 (which is 75 percent of the cost incurred), with the remaining \$3,838,000 (including budgeting and financial controls) anticipated to be covered through a combination of either stimulus dollars or federal grants.

Rhode Island was one of the only states in the country to have a large amount of federal stimulus money available at the end of the last calendar year in December 2020 that we were able to allocate to businesses during the pause. The availability of this funding can be attributed to how the State properly budgeted its federal aid, optimized its resources, and implemented strong controls -- which we attribute in large part to the budgeting and financial support we received from Alvarez & Marsal.

As has been the case throughout the pandemic, the State will determine the appropriate funding source for its portion of the cost. The goal remains to leverage the source that allows the State to maximize its return on investment so that we continue efficiently meeting the needs of Rhode Islanders.

Subject: Fwd: RFP

From: Michael Magee [REDACTED]

Date: 3/8/2021, 9:56 AM

To: Dan McKee [REDACTED], Anthony Silva [REDACTED]

Dan and Tony,

This is what I sent to Jim and Nancy last week.

Mike

----- Forwarded message -----

From: Michael Magee [REDACTED]

Date: Fri, Mar 5, 2021 at 12:56 PM

Subject: RFP

To: Thorsen, James (DOR) [REDACTED], McIntyre, Nancy (DOA)

Cc: [REDACTED]

Hi Jim and Nancy,

Great to meet you and thanks so much for your help!

Here is a brief scope of work for what I described in our meeting. Happy to provide any additional details you need:

We're look for qualified vendor to provide comprehensive school reopening support along with technical assistance in accelerating learning for Rhode Island students to RIDE and local education agencies (LEAs). I personally think "qualified" should be defined as a firm whose partners have worked on the health and education areas listed below in at least 15 large school districts and at least 6 states.

The specific goals are:

- Support the Office of the Governor, Department of Health, Department of Education, LEAs and other relevant agencies in developing a coherent approach to vaccinating teachers and other essential schools staff and overcoming any vaccine hesitancy among teachers and school staff through effective communications.
- Support Rhode Island LEAs to design and implement approaches to COVID testing for all teachers, staff and students, in coordination with relevant offices and agencies.
- Provide project management support of all aspects of school reopening including strategic advising to Rhode Island Department of Education, analysis of all COVID relief funding, program design and evaluation, policy development, stakeholder communications and engagement and implementation support.
- Support design and implementation of Rhode Island plan to address student learning loss,

including: strategic planning, the use of municipal education offices, equity audits, accountability services, learning loss program design and evaluation and implementation support.

We want one vendor with the capacity to oversee, manage and deliver on all this work.

My own analysis is that we're looking at about \$12-15M worth of work over two years across the buckets above. Happy to provide some detail about how that breaks down across workstreams if that's helpful. I expect a firm will have 4 project teams dedicated to executing on these deliverables.

7 day turnaround would be ideal.

I'm available anytime to answer questions.

Best,

Mike

 (my cell)

Fwd: RI Contract

From: Julia Rafal-Baer <[REDACTED]>
To: Cerena Figueroa <[REDACTED]>, Devon Puglia <[REDACTED]>
Date: Mon, 08 Mar 2021 11:30:08 -0500
Attachments: Chiefs for Change SKDK Agreement No3 Rhode Island Communications Support Project TAC
2182021[66]_v2.docx (3.17 MB)

C - new SKDK contract. Can you please work with SKDK on this?

Thanks!

----- Forwarded message -----

RIDE RFP

From: "McIrtyre, Nancy (DOA)" <[REDACTED]>
To: "Thorsen, Jim (DOA)" <[REDACTED]>
Date: Tue, 09 Mar 2021 22:44:09 -0500

Jim,

I spoke with Kristen Cole this afternoon at RIDE. She's suggesting that Education Ops Center headed by Director Kristen Danusis would probably be best to tap for this assignment. Ana Riley, Deputy Commissioner, Instructional Programs also may be a great place to start to bring her into the conversation. I forwarded the scope to Kristen Cole that Mike outlined for us. She planned on running it up the ladder to her boss, Mark Dunham. I was hoping for a call back this evening but haven't heard from anyone. Kristen knows and understands this is an absolute priority for Governor McKee. I will follow up with her in the morning and then report back.

Best,
Nancy

Subject: Re: RI Contract

From: Julia Rafal-Baer <[REDACTED]>

Date: 3/9/2021, 12:50 PM

To: Cerena Figueroa <[REDACTED]>

Backdate - please make sure nothing in the scope would be construed as lobbying or gifts.

On Mar 9, 2021, at 12:46 PM, Cerena Figueroa <[REDACTED]> wrote:

I think its fine since the scope includes education and ecosystem. I did have a question - if we wanted to backdate this? **It looks like the scope started in January or would we want 6 months starting March.**

Six Months

We would view a six-month project as a combination of our intensive short-term sprint in the initial three months with longer-term surrogate development in the latter period of the project. A six-month project would include all of the above, but would focus more on providing air-cover and working with educational partners to communicate in support of the administration. That would include:

- Drafting surrogate talking points, op-eds, and other communications in support of the McKee team and of the ecosystem
- **Working with and helping activate educational partners, public charter school network leaders, and partners in the ecosystem to proactively communicate in support of the incoming governor**
- Develop a six-month communications plan for the ecosystem in support of the transition and the new governor

On Tue, Mar 9, 2021 at 12:42 PM Julia Rafal-Baer <[REDACTED]> wrote:

Please be sure there is nothing sketchy or illegal in this

On Mar 9, 2021, at 12:22 PM, Cerena Figueroa <[REDACTED]> wrote:

Yep! Devon - I'll send over the final shortly.

Best,
Cerena

On Mon, Mar 8, 2021 at 11:30 AM Julia Rafal-Baer <[REDACTED]> wrote:

C - new SKDK contract. Can you please work with SKDK on this?

Thanks!

----- Forwarded message -----

--

Cerena Figueroa *Senior Director of Operations*
[REDACTED] chiefsforchange.org [REDACTED]
1455 Pennsylvania Ave., NW Suite 400-311 Washington, DC 20004

--

Cerena Figueroa *Senior Director of Operations*
[REDACTED] chiefsforchange.org [REDACTED]
1455 Pennsylvania Ave., NW Suite 400-311 Washington, DC 20004

Adesuyi, Doris (GOV)

From: Thorsen, Jim (DOA)
Sent: Tuesday, March 9, 2021 8:47 AM
To: McCabe, Brenna M (GOV)
Cc: Licht, Jeremy (DOA); McIntyre, Nancy (DOA)
Subject: Fw: [EXTERNAL] : RFP

Brenna

Gov McKee called this morning to ask me if we can move this along.
I will call Nancy and touch base with Jeremy and we can meet back up after you talk to Tom.

thx
jet

From: Thorsen, James (DOR) <[REDACTED]>
Sent: Tuesday, March 9, 2021 8:45 AM
To: Thorsen, Jim (DOA) <[REDACTED]>
Subject: FW: [EXTERNAL] : RFP
From: Michael Magee <[REDACTED]>
Sent: Friday, March 5, 2021 12:56 PM
To: Thorsen, James (DOR) <[REDACTED]> McIntyre, Nancy (DOA)
<[REDACTED]>
Cc: [REDACTED]
Subject: [EXTERNAL] : RFP

Hi Jim and Nancy,

Great to meet you and thanks so much for your help!

Here is a brief scope of work for what I described in our meeting. Happy to provide any additional details you need:
We're look for qualified vendor to provide comprehensive school reopening support along with technical assistance in accelerating learning for Rhode Island students to RIDE and local education agencies (LEAs). I personally think "qualified" should be defined as a firm whose partners have worked on the health and education areas listed below in at least 15 large school districts and at least 6 states.

The specific goals are:

- Support the Office of the Governor, Department of Health, Department of Education, LEAs and other relevant agencies in developing a coherent approach to vaccinating teachers and other essential schools staff and overcoming any vaccine hesitancy among teachers and school staff through effective communications.
- Support Rhode Island LEAs to design and implement approaches to COVID testing for all teachers, staff and students, in coordination with relevant offices and agencies.
- Provide project management support of all aspects of school reopening including strategic advising to Rhode Island Department of Education, analysis of all COVID relief funding, program design and evaluation, policy development, stakeholder communications and engagement and implementation support.
- Support design and implementation of Rhode Island plan to address student learning loss, including: strategic planning, the use of municipal education offices, equity audits, accountability services, learning loss program design and evaluation and implementation support.

We want one vendor with the capacity to oversee, manage and deliver on all this work.

My own analysis is that we're looking at about \$12-15M worth of work over two years across the buckets above. Happy to provide some detail about how that breaks down across workstreams if that's helpful. I expect a firm will have 4 project teams dedicated to executing on these deliverables.

7 day turnaround would be ideal.

I'm available anytime to answer questions.

Best,
Mike
[REDACTED] (my cell)

Re: RFP Template

From: "Thorsen, Jim (DOA)" <[REDACTED]>
To: Antonio Afonso <[REDACTED]>
Cc: "McIntyre, Nancy (DOA)" <[REDACTED]>
Date: Fri, 12 Mar 2021 19:42:30 -0500

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From: Thorsen, Jim (DOA)
Sent: Thursday, March 11, 2021 4:15:34 PM
To: Antonio Afonso <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]>
Subject: FW: RFP Template

Tony
Here is the first element of our quest to procure services for reopening the schools – a template for the rfp.
We need to develop the scope of services ASAP.
Nancy is working on a timeline we can manage to, with milestones.
Might I suggest a call to discuss tomorrow?
Thx
jet

James E. Thorsen
Acting Director of Administration
State of Rhode Island
[REDACTED] (o)
[REDACTED] (c)

From: McIntyre, Nancy (DOA) <[REDACTED]>
Sent: Thursday, March 11, 2021 3:59 PM
To: Thorsen, Jim (DOA) <[REDACTED]>
Subject: RFP Template
Importance: High

Jim,

Attached are the RFP template and RFP template tips to guide the user in preparation of this RFP. In order for the Division of Purchases to create and post a solicitation, we will need a requisition from the Governor's office. I believe that Jennifer Fondeur can assist with the requisition. Timeline expectations will follow in a separate email.

Best,
Nancy



Solicitation Information
DATE

RFP #,...

TITLE:

Submission Deadline: DATE TIME (Eastern Time)

PRE-BID/ PROPOSAL CONFERENCE:
MANDATORY:

If YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents. A vendor's failure to attend and register at the mandatory Pre-Bid/ Proposal Conference shall result in disqualification of the vendor's bid proposals as non-responsive to the solicitation.

DATE:
LOCATION:

Questions concerning this solicitation must be received by the Division of Purchases a [REDACTED] no later than **DATE (EST)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

BID SURETY BOND REQUIRED:

PAYMENT AND PERFORMANCE BOND REQUIRED:

NAME OF BUYER, TITLE OF BUYER

Note to Applicants:

1. Vendors must register in RIVIP at the Division of Purchases' website at <https://www.purchasing.ri.gov/RIVIP/VendorRegistration.aspx>.
2. Proposals received without a completed RIVIP Vendor Certification Cover Form attached may result in disqualification.

THIS PAGE IS NOT A RIVIP VENDOR CERTIFICATION COVER FORM

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Commented [A2]: Purchases to fill-in

Commented [A3]: Agency to fill-in

Commented [A4]: Agency: Yes or No question

Commented [A5]: If yes, Purchases will work with the agency to identify the date, time and location.

Commented [A6]: Purchases to fill-in

Commented [A7]: Purchases to fill-in

Commented [A8]: Agency: Yes or No

Commented [A9]: Agency: Yes or No

Commented [A10]: Purchases to fill-in

COVID-19 EMERGENCY PROTOCOL FOR BID OPENINGS

Vendors and the public are advised that due to Covid-19 emergency social distancing requirements bid openings at the Division of Purchases shall be conducted via live streaming on the ZOOM website/application. Vendors and the public shall not be permitted to enter the Division of Purchases to attend bid openings. Vendors and the public who attend bid openings via live streaming shall be required to identify themselves and a record of all such attendees shall be maintained by the Division of Purchases. Vendor bid proposals shall be opened and read aloud at the date and time listed herein. The results of bid solicitations requiring a public copy for public works projects shall be posted on the Division of Purchases website as soon as possible after the bid opening. For RFP solicitations only vendor names shall be read aloud at the opening.

Vendors and the public are further advised that visitor access to the Powers Building at One Capitol Hill, Providence, RI requires pre-screening at the entrance to the building. In accordance with the Governor's Executive Order(s) and Department of Health emergency regulations all visitors to the Powers Building must wear a cloth mask which covers the nose and mouth. Vendors delivering bid proposals to the Division of Purchases should allow sufficient time for the pre-screening process. The Division of Purchases assumes no responsibility for delays caused by the screening process or any other reason. Vendors are solely responsible for on time delivery of bid proposals. The Division of Purchases shall not accept late bids for any reason.

BID OPENING ZOOM INFORMATION

Division of Purchases is inviting you to a scheduled Zoom meeting for the bid opening.

Enter Zoom info: Link, call-in, etc

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Commented [A12]:

Automated TOC:

Right click to update and select one of the two options that appear in the pop-up window.

If you need to have a header display here (or not), place your cursor in front of that header within the document > Go to the 'References' tab > Click on the drop down arrow next to 'Add Text' (on the left side of the tool bar) > Select do not show, Level 1, 2 or 3 accordingly > then come back to the TOC > right click to update.

SECTION 1: INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the Insert **Agency Name** (“Insert Agency Name Acronym”), is soliciting proposals from qualified firms to provide [Provide a brief description of the service(s) your agency is looking to acquire], in accordance with the terms of this Request for Proposals (“RFP”) and the State’s General Conditions of Purchase, which may be obtained at the Division of Purchases’ website at www.ridop.ri.gov.

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Commented [A14]: Agency to fill-in

The initial contract period will begin approximately January 1, 2013 for one year. Contracts may be renewed for up to four additional 12-month periods based on vendor performance and the availability of funds.

Commented [A15]: What is the desired term or length of service? Renewal option(s)?

This is a Request for Proposals, not a Request for Quotes. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to cost; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this solicitation, other than to name those vendors who have submitted proposals.

Instructions and Notifications to Vendors

1. Potential vendors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFP are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP may be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP or for providing oral or written clarification of its content, shall be borne by the vendor. The State assumes no responsibility for these costs even if the RFP is cancelled or continued.
4. Proposals are considered to be irrevocable for a period of not less than 180 days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated in the proposal.
6. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Subcontracts are permitted, provided that their use is clearly indicated in the vendor’s proposal and the subcontractor(s) to be used is identified in the proposal.
7. The purchase of goods and/or services under an award made pursuant to this RFP will be contingent on the availability of appropriated funds.

8. Vendors are advised that all materials submitted to the Division of Purchases for consideration in response to this RFP may be considered to be public records as defined in R. I. Gen. Laws § 38-2-1, *et seq.* and may be released for inspection upon request once an award has been made.

Any information submitted in response to this RFP that a vendor believes are trade secrets or commercial or financial information which is of a privileged or confidential nature should be clearly marked as such. The vendor should provide a brief explanation as to why each portion of information that is marked should be withheld from public disclosure. Vendors are advised that the Division of Purchases may release records marked confidential by a vendor upon a public records request if the State determines the marked information does not fall within the category of trade secrets or commercial or financial information which is of a privileged or confidential nature.

9. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
10. By submission of proposals in response to this RFP vendors agree to comply with R. I. General Laws § 28-5.1-10 which mandates that vendors/subcontractors doing business with the State of Rhode Island exercise the same commitment to equal opportunity as prevails under Federal contracts controlled by Federal Executive Orders 11246, 11625 and 11375.

Vendors are required to ensure that they, and any subcontractors awarded a subcontract under this RFP, undertake or continue programs to ensure that minority group members, women, and persons with disabilities are afforded equal employment opportunities without discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability.

Vendors and subcontractors who do more than \$10,000 in government business in one year are prohibited from engaging in employment discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability, and are required to submit an "Affirmative Action Policy Statement."

Vendors with 50 or more employees and \$50,000 or more in government contracts must prepare a written "Affirmative Action Plan" prior to issuance of a purchase order.

- a. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation.
- b. Vendors further agree, where applicable, to complete the "Contract Compliance Report" (<http://odeo.ri.gov/documents/odeo-eeo-contract-compliancereport.pdf>), as well as the "Certificate of Compliance" (<http://odeo.ri.gov/documents/odeo-eeo-certificate-of-compliance.pdf>), and submit both documents, along with their Affirmative Action Plan or an Affirmative Action Policy Statement, prior to issuance of a purchase order.

For further information, contact the Rhode Island Equal Employment Opportunity Office via e-mail at [REDACTED]

11. In accordance with R. I. Gen. Laws § 7-1.2-1401 no foreign corporation has the right to transact business in Rhode Island until it has procured a certificate of authority so to do from the Secretary of State. This is a requirement only of the successful vendor(s). For further information, contact the Secretary of State at (401-222-3040).
12. In accordance with R. I. Gen. Laws §§ 37-14.1-1 and 37-2.2-1 it is the policy of the State to support the fullest possible participation of firms owned and controlled by minorities (MBEs) and women (WBEs) and to support the fullest possible participation of small disadvantaged businesses owned and controlled by persons with disabilities (Disability Business Enterprises a/k/a "DisBE")(collectively, MBEs, WBEs, and DisBEs are referred to herein as ISBEs) in the performance of State procurements and projects. As part of the evaluation process, vendors will be scored and receive points based upon their proposed ISBE utilization rate in accordance with 150-RICR-90-10-1, "Regulations Governing Participation by Small Business Enterprises in State Purchases of Goods and Services and Public Works Projects". As a condition of contract award vendors shall agree to meet or exceed their proposed ISBE utilization rate and that the rate shall apply to the total contract price, inclusive of all modifications and amendments. Vendors shall submit their ISBE participation rate on the enclosed form entitled "MBE, WBE and/or DisBE Plan Form", which shall be submitted in a separate, sealed envelope as part of the proposal. ISBE participation credit will only be granted for ISBEs that are duly certified as MBEs or WBEs by the State of Rhode Island, Department of Administration, Office of Diversity, Equity and Opportunity or firms certified as DisBEs by the Governor's Commission on Disabilities. The current directory of firms certified as MBEs or WBEs may be accessed at <http://odeo.ri.gov/offices/mbeco/mbe-wbe.php>. Information regarding DisBEs may be accessed at www.gcd.ri.gov. For further information, visit the Office of Diversity, Equity & Opportunity's website, at <http://odeo.ri.gov/> and see R.I. Gen. Laws Ch. 37-14.1, R.I. Gen. Laws Ch. 37-2.2, and 150-RICR-90-10-1. The Office of Diversity, Equity & Opportunity may be contacted at, [REDACTED] or via email [REDACTED]
13. In the RIVIP Vendor Certification Cover Form, Section 4, Question 11, bidders shall certify agreement to the State's contract terms. However, in accordance with Section 220-RICR-30-00-13.3(C)(3) of the General Conditions, the Vendor may submit in their bid or proposal, "[q]ualified or conditional offers which impose limitations of the Vendor's liability or modify the requirements of the solicitation, offers for alternate specifications, or offers which are made subject to different terms and conditions, including form contracts, other than those specified by the State." However, qualified or conditional offers "may be, at the sole discretion of the State Purchasing Agent:
 - a. Rejected as being non-responsive; or,
 - b. Set aside in favor of the requirements set forth in the solicitation (with the consent of the Vendor); or,
 - c. Accepted, if the State Purchasing Agent determines in writing that such acceptance is in the best interest of the State."

By submitting a conditional or qualified offer, the Vendor bears the risk of their bid or proposal being considered non-responsive. In the event the State receives a conditional or qualified offer, the State reserves the right to adjust evaluation points in an RFP procurement, conduct a best and final offer process offering the same terms to all vendors, and/or reject a qualified/conditional proposal as being non-responsive at any time during the review process. The Vendor should not assume that any further negotiation will occur upon selection.

14. **Insurance Requirements** – In accordance with this solicitation, or as outlined in Section 13.19 of the General Conditions of Purchase, found at <https://rules.sos.ri.gov/regulations/part/220-30-00-13> and General Conditions - Addendum A found at <https://www.ridop.ri.gov/documents/general-conditions-addendum-a.pdf>, the following insurance coverage shall be required of the awarded vendor(s):

Commented [A16]: Agency Note – Select the applicable insurance for this solicitation (click on box). The General Conditions of Purchase Addendum A provides details on each coverage type to assist in selection(s), found at <https://www.ridop.ri.gov/documents/general-conditions-addendum-a.pdf>.

General Requirements:

- 14a) Liability - combined single limit of \$1,000,000 per occurrence, \$1,000,000 general aggregate and \$1,000,000 products/completed operations aggregate.
- 14b) Workers compensation - \$100,000 each accident, \$100,000 disease or policy limit and \$100,000 each employee.
- 14c) Automobile liability - \$1,000,000 each occurrence combined single limit.
- 14d) Crime - \$500,000 per occurrence or 50% of contract amount, whichever is greater.

Professional Services:

- 14e) Professional liability (“errors and omissions”) - \$2,000,000 per occurrence, \$2,000,000 annual aggregate.
- 14f) Environmental/Pollution Liability when past, present or future hazard is possible - \$1,000,000 per occurrence and \$2,000,000 aggregate.
- 14g) Working with Children, Elderly or Disabled Persons – Physical Abuse and Molestation Liability Insurance - \$1 Million per occurrence.

Information Technology and/or Cyber/Privacy:

- 14h) Technology Errors and Omissions - Combined single limit per occurrence shall not be less than \$5,000,000. Annual aggregate limit shall not be less than \$5,000,000.
- 14i) Information Technology Cyber/Privacy – minimum limits of \$5,000,000 per occurrence and \$5,000,000 annual aggregate. If Contract Party provides:
- a) key back office services Contract Party shall have a minimum limit of \$10,000,000 per occurrence and \$10,000,000 annual aggregate;
- b) if Contract Party has access to Protected Health Information as defined in HIPAA and its implementing regulations, Personal Information as defined in R.I. Gen. Laws § 11-49.3-1, et seq., or as otherwise defined in the Contract (together Confidential Information”), Contract Party shall have as a minimum the per occurrence, per annual aggregate, the total rounded product of projected number of persons data multiplied by \$25 per person

- breach response expense per occurrence; but no less than \$5,000,000 per occurrence, per annual aggregate; or,
- c) if the Contract Party provides or has access to mission critical services, network architecture and/or the totality of confidential data \$20,000,000 per occurrence and in the annual aggregate.

Other:

Specify insurance type and minimum coverage required, e.g. builder's risk insurance, vessel operation (marine or aircraft):

- 14j) Other - Specify insurance type and minimum coverage required

15. HIPAA - Under HIPAA, a "business associate" is a person or entity, other than a member of the workforce of a HIPAA covered entity, who performs functions or activities on behalf of, or provides certain services to, a HIPAA covered entity that involves access by the business associate to HIPAA protected health information. A "business associate" also is a subcontractor that creates, receives, maintains, or transmits HIPAA protected health information on behalf of another business associate. The HIPAA rules generally require that HIPAA covered entities and business associates enter into contracts with their business associates to ensure that the business associates will appropriately safeguard HIPAA protected health information. Therefore, if a Vendor qualifies as a business associate, it will be required to sign a HIPAA business associate agreement

16. Eligible Entity - In order to perform the contemplated services related to the Rhode Island Health Benefits Exchange (HealthSourceRI), the vendor hereby certifies that it is an "eligible entity," as defined by 45 C.F.R. § 155.110, in order to carry out one or more of the responsibilities of a health insurance exchange. The vendor agrees to indemnify and hold the State of Rhode Island harmless for all expenses that are deemed to be unallowable by the Federal government because it is determined that the vendor is not an "eligible entity," as defined by 45 C.F.R. § 155.110.

Commented [A17]: Only for RFPs related to health services and /or records.

17. Bid Surety Bond – Vendors responding to this RFP must furnish, with their bid proposals, either a bid bond from a surety licensed to conduct business in the State of Rhode Island or a certified check payable to the State of Rhode Island in the amount of five (5%) percent of the vendor's cost proposal. (*Vendors for Rhode Island Department of Transportation highway and bridge projects must furnish, with their bid proposals, a bid bond from a surety licensed to conduct business in the State of Rhode Island. Certified checks are not permitted for these projects.*) An attorney-in-fact who executes a bond on behalf of the surety must provide a certified current copy of the power of attorney. A successful vendor who fails to submit the additional documentation required by the tentative letter of award and/or fails to commence and pursue the work in accordance with the contract awarded pursuant to this solicitation may forfeit, at the discretion of the State Purchasing Agent, the full amount of the bid surety as liquidated damages. The State will retain the bid surety of all vendors until the earliest of: (i) the issuance of the Purchase Order; (ii) the 61st day following the proposal submission deadline; or (iii) the rejection of all proposals.

18. Payment and Performance Bond - The successful vendor must furnish a 100% payment and performance bond from a surety licensed to conduct business in the State of Rhode Island upon the tentative award of the contract pursuant to this solicitation.

Commented [A18]: Only for RFPs with Payment and Performance Bonds. Cover page should also indicate "Yes" if this bond is required.

Commented [A19]: Only for RFPs with Bid Surety Bonds. Cover page should also indicate "Yes" if this bond is required.

19. **Master Price Agreements - Contract Administrative Fee** - In 2017 the General Assembly amended the "State Purchases Act", R. I. Gen. Laws § 37-2-12 (b) to authorize the Chief Purchasing Officer to establish, charge and collect from vendors listed on master price agreements ("MPA") a contract administrative fee not to exceed one percent (1%) of the total value of the annual spend against their MPA contracts. All contract administrative fees collected from MPA vendors shall be deposited into a restricted receipt account which shall be used for the purposes of implementing and maintaining an online eProcurement system and other costs related to State procurement. In accordance with this legislative initiative the Division of Purchases is upgrading the State procurement system through the purchase and installation of an eProcurement system. The contract administrative fee shall be applicable to all purchase orders issued relative to State MPA contracts. Therefore, effective January 1, 2020 all MPA contracts shall be assessed the 1% contract administrative fee.
20. **AIA Contract** - For public works projects, the selected Vendor must submit a fully executed Rhode Island custom AIA contract. If awarded the contract, Vendor shall be required to obtain the specified AIA Documents from <https://documentsondemand.aia.org/?filter=Rhode>. Design Agents must obtain and utilize the Custom Rhode Island AIA Documents G701-2017, AIA G714-2017, AIA G802-2017, which can also be located at <https://documentsondemand.aia.org/?filter=Rhode>. Full instructions will be included in the Tentative Selection Letter.

Commented [A20]: Required for MPA RFPs only.

Commented [A21]: Required for applicable public works solicitations that will result in an AIA contract with the selected vendor at time of tentative selection. This is to notify vendors of this requirement up front in the solicitation as the AIA forms do require a nominal fee.

Commented [A22]: Background should describe the necessary information for vendors to understand why the services are being sought. Describe the authority to conduct the work on the state's behalf. Provide data, if possible, of past service levels or any relevant information that would assist the vendor in understanding the needs of the state for the service being sought.

For reference, RFP examples can be found at the Division of Purchases website at <https://www.ridop.ri.gov/>

Commented [A23]: The Scope of Work section is really the nuts and bolts behind the project's authorization of work. What you are requesting of the vendor should be clear and concise and driven by deliverables where ever possible. This is where you describe the expectations and layout what the core function of the work should be, i.e.: deliverables, tasks or work products.

Agencies are able to customize this section as needed to best convey the SOW and requirements for their specific goods and/or services.

For reference, RFP examples can be found at the Division of Purchases website at <https://www.ridop.ri.gov/>

Commented [A24]: Section 4.A.1-4 is a *suggested approach*.

Choose criteria that will prove the vendor's ability to deliver the work that is requested in this RFP's scope. Be sure to describe each criterion so that the vendor knows what to expect and how they will be measured.

This becomes your scoring criteria for Section 5.

If you would like the ability to have **vendor interviews or demonstrations**, please contact your Buyer at the Division of Purchases to request template substitutions for the current sections 4 and 5. Please note that proceeding with sections 4 and 5 as written in this template **will not** allow your team to conduct any vendor interviews or demonstrations.

SECTION 2: BACKGROUND

See comment.

SECTION 3: SCOPE OF WORK AND REQUIREMENTS

See comment.

SECTION 4: PROPOSAL

A. Technical Proposal

Narrative and format: The proposal should address specifically each of the following elements:

1. **Staff Qualifications** – Provide staff resumes/CV and describe qualifications and experience of key staff who will be involved in this project, including their experience in [insert description of field of expertise].
2. **Capability, Capacity, and Qualifications of the Vendor** - Please provide a detailed description of the Vendor's experience as a [insert description of field of expertise]. List a minimum of three (3) relevant client references, to include client names, addresses, contact names with emails and phone numbers, dates of service and type(s) of service(s) provided.
3. **Work Plan** - Please describe in detail, the framework within which requested [insert service type] services will be performed. The following elements should be included: [Insert list of elements]

4. **Approach/Methodology** – Define the methodology to be used for [insert description of efforts you are looking for the vendor to define in their response]

B. Cost Proposal

Detailed Budget and Budget Narrative:

Provide a cost proposal for the required services which include the following: [Insert description].

C. ISBE Proposal

See Appendix A for information and the MBE, WBE and/or Disability Business Enterprise Participation Plan form(s). Vendors are required to complete, sign and submit these form(s) with their overall proposal in a sealed envelope. Please complete separate form(s) for each MBE, WBE and/or Disability Business Enterprise subcontractor to be utilized on the solicitation.

SECTION 5: EVALUATION AND SELECTION

Proposals shall be reviewed by a technical evaluation committee (“TEC”) comprised of staff from State agencies. The TEC first shall consider technical proposals.

Technical proposals must receive a minimum of 60 (85.7%) out of a maximum of 70 points to advance to the cost evaluation phase. Technical proposals scoring less than 60 points shall not have the accompanying cost or ISBE participation proposals opened or evaluated; such proposals shall not receive further consideration.

Technical proposals scoring 60 points or higher shall have the cost proposals evaluated and assigned up to a maximum of 30 points bringing the total potential evaluation score to 100 points. As total possible evaluation points are determined, vendor ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

The Division of Purchases reserves the right to select the vendor(s) or firm(s) (“vendor”) that it deems to be most qualified to provide the goods and/or services as specified herein; and, conversely, reserves the right to cancel the solicitation in its entirety in its sole discretion.

Proposals shall be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Staff Qualifications	10 Points
Capability, Capacity, and Qualifications of the Vendor	10 Points
Work Plan	30 Points

Commented [A25]: First determine your cost proposal structure as a lump sum fixed fee, time and materials, deliverable based or reimbursable based. Highly recommend an appendix/ spreadsheet to be included, so you can get consistent responses from the vendors which in turn will make evaluation flow smoother.

Commented [A26]: Set the technical threshold at a reasonable level, so you can adequately measure who does not meet the minimum requirements. Remember too high and you may kick-out a good candidate, too low and you may have to live with a subpar vendor.

Commented [A27]: 1. Please make sure this aligns to Section 4.A.
2. For exceptions to the standard scoring format contact the Purchases Buyer responsible for this RFP to collaborate on an “alternate scoring template”.

Commented [A28]: The 70-point max can be divided up as you deem fit among the criteria you choose.
Make sure these point categories mirror the categories set forth in Section 4.A. Technical Proposal

Approach/Methodology	20 Points
Total Possible Technical Points	70 Points
Cost proposal*	30 Points
Total Possible Evaluation Points	100 Points
ISBE Participation**	6 Bonus Points
Total Possible Points	106 Points

Commented [A29]: Cost cannot be lower than 30, but it can be higher- Be sure to adjust the Technical points so that the total is 100.

***Cost Proposal Evaluation:**

The vendor with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other vendors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{vendor's cost proposal}) \times \text{available points}$$

For example: If the vendor with the lowest cost proposal (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly costs and service fees and the total points available are thirty (30), Vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 \times 30 = 19.5$$

****ISBE Participation Evaluation:**

A. Calculation of ISBE Participation Rate

1. ISBE Participation Rate for Non-ISBE Vendors. The ISBE participation rate for non-ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of non-ISBE vendor's total contract price that will be subcontracted to ISBEs by the non-ISBE vendor's total contract price. For example, if the non-ISBE's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs, the non-ISBE's ISBE participation rate would be 12%.
2. ISBE Participation Rate for ISBE Vendors. The ISBE participation rate for ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of the ISBE vendor's total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the ISBE vendor by the ISBE vendor's total contract price. For example if the ISBE vendor's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs and will perform a total of \$8,000.00 of the work itself, the ISBE vendor's ISBE participation rate would be 20%.

B. Points for ISBE Participation Rate:

The vendor with the highest ISBE participation rate shall receive the maximum ISBE participation points. All other vendors shall receive ISBE participation points by applying the following formula:

$$\frac{\text{(Vendor's ISBE participation rate} \div \text{Highest ISBE participation rate)}}{\text{X Maximum ISBE participation points}}$$

For example, assuming the weight given by the RFP to ISBE participation is 6 points, if Vendor A has the highest ISBE participation rate at 20% and Vendor B's ISBE participation rate is 12%, Vendor A will receive the maximum 6 points and Vendor B will receive $(12\% \div 20\%) \times 6$ which equals 3.6 points.

General Evaluation:

Points shall be assigned based on the vendor's clear demonstration of the ability to provide the requested goods and/or services. Vendors may be required to submit additional written information or be asked to make an oral presentation before the TEC to clarify statements made in the proposal.

SECTION 6: QUESTIONS

Questions concerning this solicitation must be e-mailed to the Division of Purchases at [REDACTED] no later than the date and time indicated on page one of this solicitation. No other contact with State parties is permitted. Please reference **RFP # XXXXX** on all correspondence. Questions should be submitted in writing in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related postings such as addenda. If technical assistance is required, call the Help Desk at (401) 574-8100.

Commented [A30]: Purchases to fill-in

Commented [A31]: Purchases to fill-in

SECTION 7: PROPOSAL CONTENTS

A. Proposals shall include the following:

1. One completed and signed RIVIP Vendor Certification Cover Form (included in the original copy only) downloaded from the Division of Purchases website at www.ridop.ri.gov. *Do not include any copies in the Technical or Cost proposals.*
2. Two (2) completed original and copy versions, signed and sealed Appendix A. MBE, WBE, and/or Disability Business Enterprise Participation Plan. Please complete separate forms for each MBE, WBE or Disability Business Enterprise subcontractor/vendor to be utilized on the solicitation. *Do not include any copies in the Technical or Cost proposals.*
3. Technical Proposal - describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The technical proposal is limited to **six (6) pages** (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request).
 - a. One (1) Electronic copy on a CD-R, marked "Technical Proposal - Original".
 - b. One (1) printed paper copy, marked "Technical Proposal -Original" and signed.

Commented [A32]: Be sure this matches with the 4.A. Technical Proposal section and scope of work

Commented [A33]: Define a reasonable number of pages that accommodates both a thorough response from a vendor as well as providing consideration to the evaluation committee that has to read all the proposals.

c. Four (4) printed paper copies

4. Cost Proposal - A separate, signed and sealed cost proposal reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project.
- One (1) Electronic copy on a CD-R, marked "Cost Proposal - Original".
 - One (1) printed paper copy, marked "Cost Proposal -Original" and signed.
 - Four (4) printed paper copies

Commented [A34]: Be sure this matches with the cost proposal section description.

B. Formatting of proposal response contents should consist of the following:

- Formatting of CD-Rs – Separate CD-Rs are required for the technical proposal and cost proposal. All CD-Rs submitted must be labeled with:
 - Vendor's name
 - RFP #
 - RFP Title
 - Proposal type (e.g., technical proposal or cost proposal)
 - If file sizes require more than one CD-R, multiple CD-Rs are acceptable. Each CD-R must include the above labeling and additional labeling of how many CD-Rs should be accounted for (e.g., 3 CD-Rs are submitted for a technical proposal and each CD-R should have additional label of '1 of 3' on first CD-R, '2 of 3' on second CD-R, '3 of 3' on third CD-R).

Vendors are responsible for testing their CD-Rs before submission as the Division of Purchase's inability to open or read a CD-R may be grounds for rejection of a Vendor's proposal. All files should be readable and readily accessible on the CD-Rs submitted with no instructions to download files from any external resource(s). If a file is partial, corrupt or unreadable, the Division of Purchases may consider it "non-responsive". USB Drives or any other electronic media shall not be accepted. Please note that CD-Rs submitted, shall not be returned.

2. Formatting of written documents and printed copies:

- For clarity, the technical proposal shall be typed. These documents shall be single-spaced with 1" margins on white 8.5"x 11" paper using a font of 12-point Calibri or 12-point Times New Roman.
- All pages on the technical proposal are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments. The Vendor's name should appear on every page, including attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to.
- If the solicitation includes a proposal template for vendor use, it shall be typed using the formatting provided in the template.
- Printed copies are to be only bound with removable binder clips.

Commented [A35]: Include any additional documents that are required to be typed.

Commented [A36]: Include any additional documents that are required to be typed.

SECTION 8: PROPOSAL SUBMISSION

Interested vendors must submit proposals to provide the goods and/or services covered by this RFP on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases, shall not be accepted.

Proposals should be mailed or hand-delivered in a sealed envelope marked "RFP# xxxxxx" to:

Commented [A37]: Purchases to fill-in

RI Dept. of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time shall not be accepted. Proposals misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time shall be determined to be late and shall not be accepted. Proposals faxed, or emailed, to the Division of Purchases shall not be accepted. The official time clock is in the reception area of the Division of Purchases.

SECTION 9: CONCLUDING STATEMENTS

Notwithstanding the above, the Division of Purchases reserves the right to award on the basis of cost alone, to accept or reject any or all proposals, and to award in the State's best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

If a Vendor is selected for an award, no work is to commence until a purchase order is issued by the Division of Purchases.

The State's General Conditions of Purchase shall be the contractual terms and conditions between the parties upon issuance of a Purchase Order by the Division of Purchases. The State's General Conditions of Purchase can be found at <https://rules.sos.ri.gov/regulations/part/220-30-00-13> and addenda can be found at <https://ridop.ri.gov/rules-regulations/>.

APPENDIX A. PROPOSER ISBE RESPONSIBILITIES AND MBE, WBE, AND/OR DISABILITY BUSINESS ENTERPRISE PARTICIPATION FORM

A. Proposer's ISBE Responsibilities (from 150-RICR-90-10-1.7.E)

1. Proposal of ISBE Participation Rate. Unless otherwise indicated in the RFP, a Proposer must submit its proposed ISBE Participation Rate in a sealed envelope or via sealed electronic submission at the time it submits its proposed total contract price. The Proposer shall be responsible for completing and submitting all standard forms adopted pursuant to 105-RICR-90-10-1.9 and submitting all substantiating documentation as reasonably requested by either the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to the names and contact information of all proposed subcontractors and the dollar amounts that correspond with each proposed subcontract.
2. Failure to Submit ISBE Participation Rate. Any Proposer that fails to submit a proposed ISBE Participation Rate or any requested substantiating documentation in a timely manner shall receive zero (0) ISBE participation points.
3. Execution of Proposed ISBE Participation Rate. Proposers shall be evaluated and scored based on the amounts and rates submitted in their proposals. If awarded the contract, Proposers shall be required to achieve their proposed ISBE Participation Rates. During the life of the contract, the Proposer shall be responsible for submitting all substantiating documentation as reasonably requested by the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to copies of purchase orders, subcontracts, and cancelled checks.
4. Change Orders. If during the life of the contract, a change order is issued by the Division, the Proposer shall notify the ODEO of the change as soon as reasonably possible. Proposers are required to achieve their proposed ISBE Participation Rates on any change order amounts.
5. Notice of Change to Proposed ISBE Participation Rate. If during the life of the contract, the Proposer becomes aware that it will be unable to achieve its proposed ISBE Participation Rate, it must notify the Division and ODEO as soon as reasonably possible. The Division, in consultation with ODEO and Governor's Commission on Disabilities, and the Proposer may agree to a modified ISBE Participation Rate provided that the change in circumstances was beyond the control of the Proposer or the direct result of an unanticipated reduction in the overall total project cost.

B. MBE, WBE, AND/OR Disability Business Enterprise Participation Plan Form:

Attached is the MBE, WBE, and/or Disability Business Enterprise Participation Plan form. Vendors are required to complete, sign and submit with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.



**STATE OF RHODE ISLAND
DEPARTMENT OF ADMINISTRATION
ONE CAPITOL HILL
PROVIDENCE, RHODE ISLAND 02908**

MBE, WBE, and/or DISABILITY BUSINESS ENTERPRISE PARTICIPATION PLAN			
Vendor's Name:			
Vendor's Address:			
Point of Contact:			
Telephone:			
Email:			
Solicitation No.:			
Project Name:			
<p>This form is intended to capture commitments between the prime contractor/vendor and MBE/WBE and/or Disability Business Enterprise subcontractors and suppliers, including a description of the work to be performed and the percentage of the work as submitted to the prime contractor/vendor. Please note that all MBE/WBE subcontractors/suppliers must be certified by the Office of Diversity, Equity and Opportunity MBE Compliance Office and all Disability Business Enterprises must be certified by the Governor's Commission on Disabilities at time of bid, and that MBE/WBE and Disability Business Enterprise subcontractors must self-perform 100% of the work or subcontract to another RI certified MBE in order to receive participation credit. Vendors may count 60% of expenditures for materials and supplies obtained from an MBE certified as a regular dealer/supplier, and 100% of such expenditures obtained from an MBE certified as a manufacturer. This form must be completed in its entirety and submitted at time of bid. Please complete <u>separate forms</u> for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.</p>			
Name of Subcontractor/Supplier:			
Type of RI Certification: <input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> Disability Business Enterprise			
Address:			
Point of Contact:			
Telephone:			
Email:			
Detailed Description of Work To Be Performed by Subcontractor or Materials to be Supplied by Supplier:			
Total Contract Value (\$):		Subcontract Value (\$):	ISBE Participation Rate (%):
Anticipated Date of Performance:			
I certify under penalty of perjury that the forgoing statements are true and correct.			
Prime Contractor/Vendor Signature		Title	Date
Subcontractor/Supplier Signature		Title	Date

M/W/Disability Business Enterprise Utilization Plan - RFPs - Rev. 5/24/2017

RFP Template TIPS

Agency edits may be made in the “yellow shaded areas”.

Solicitation Information

DATE

RFP# [....]

TITLE: [.....]

Submission Deadline: [DATE TIME (Eastern Time)]

PRE-BID/ PROPOSAL CONFERENCE:
MANDATORY:
It may edit the yellow shaded areas. IF YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents. A vendor's failure to attend and register at the mandatory Pre-Bid/ Proposal Conference shall result in disqualification of the vendor's bid proposals as non-responsive to the solicitation.

Purchases Comments are provided to guide Agency in developing the RFP Template.

MANDATORY:
If YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents. A vendor's failure to attend and register at the mandatory Pre-Bid/ Proposal Conference shall result in disqualification of the vendor's bid proposals as non-responsive to the solicitation.

DATE:
LOCATION:

Questions concerning this solicitation must be received by the Division of Purchases at dpurchasing@doj.gov later than **DATE (EST)**. Questions should be submitted as a *discreet* Word attachment. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

BID SURETY BOND REQUIRED:
PAYMENT AND PERFORMANCE BOND REQUIRED:]

NAME OF BUYER, TITLE OF BUYER:

Applicants must register on-line at the State Purchasing Website at www.purchasing.nj.gov

Note to Applicant:
Proposals received without a completed EIVIP Bidder Certification Cover Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION COVER FORM

Comments on the right side of the page include:
Francis, David (DOA) Agency: Yes or No
Skelly, Meredith (DOA) Purchases to EIVIP
Skelly, Meredith (DOA) June 11, 2017 Purchases to EIVIP
Francis, David (DOA) Agency: Yes or No
Francis, David (DOA) Agency: Yes or No
Skelly, Meredith (DOA) Purchases to EIVIP

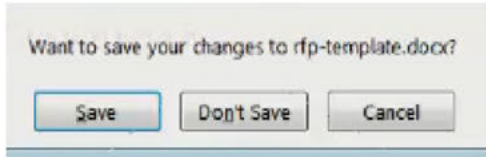
Agencies may update the Table of Contents

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Comments on the right side of the page include:
Skelly, Meredith (DOA)
Automated TOC:
Right click to update and select one of the two options that appear in the pop-up window.
If you need to have a header/footer here (or not), place your cursor on first or last header/footer of the document -> Go to the References tab -> Click on the drop-down arrow next to 'Add Text' (on the left side of the tool bar) -> Select to use above, Level 1, 2, or 3 accordingly -> then come back to the TOC -> right click to update.

Save your changes



Agency exceptions to the standing ranking format – contact buyer for alternate ranking template.

ISBE Participation**	6 Bonus Points
Total Possible	106 Points

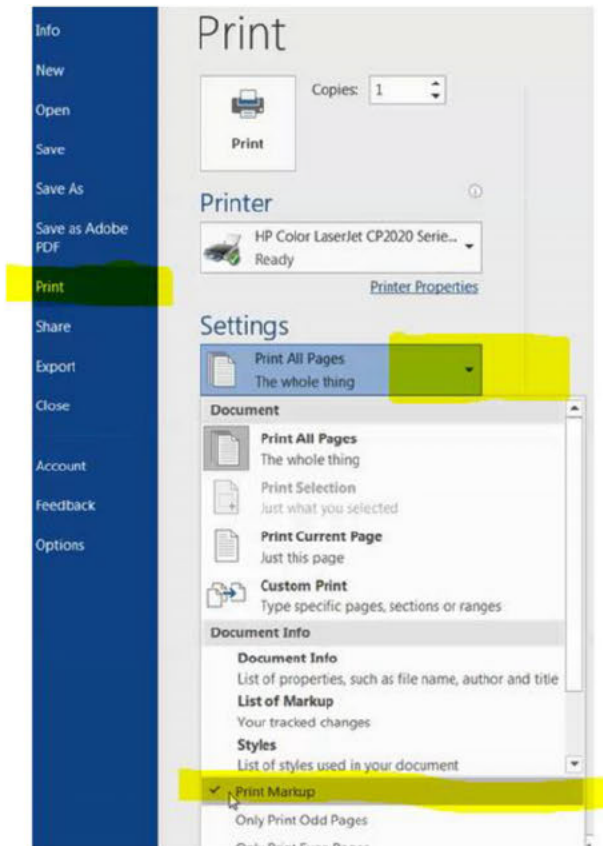
Pomfret, Alicia (DOA) August 07, 2017
For exceptions to the standard ranking format contact the Purchases Buyer responsible for this RFP to collaborate on an "alternate ranking template".

Reply Resolve

For exceptions to the standard ranking format contact the Purchases Buyer responsible for the RFP to collaborate on an “alternate ranking template”. The Buyer will provide you with the “alternate ranking template” for your edits. Agency should provide buyer with both the RFP template and alternate ranking template and the buyer will merge both documents into one comprehensive RFP document for bid posting.

Instructions to print a non-markup copy of this document (no highlights & comments).

Click on the “File” tab, select “Print”, beneath the heading “Settings” click on the down arrow to the right of “Print All Pages”, beneath the section “Document Info” click on the arrow to the left of “Print Markup”. Under the “Print” heading at the top of the page select “Print”.



You will notice a change in the “print preview” from the markup version:

or unreadable, the Division of Purchases may consider it “non-responsive”. USB Drives or any other electronic media shall not be accepted. Please note that CD-Rs submitted, shall not be returned.

B. Formatting of written documents and printed copies:

- For clarity, the technical proposal shall be typed. These documents shall be single-spaced with 1” margins on white 8.5”x 11” paper using a font of 12 point Calibri or 12 point Times New Roman.
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Proposals should be mailed or hand-delivered in a sealed envelope marked “RFP# xxxxxx” to:

RI Dept. of Administration
Division of Purchases, 2nd floor
Pena Center Hall

Comments:

- Commented [SM31]: Include any additional documents that are required to be typed.
- Commented [SM32]: Include any additional documents that are required to be typed.
- Commented [SM33]: This is for cost proposals using a State provided template (Agency creates).
- Commented [SM34]: Purchase to fill-in

To the non-markup version for printing:

or unreadable, the Division of Purchases may consider it “non-responsive”. USB Drives or any other electronic media shall not be accepted. Please note that CD-Rs submitted, shall not be returned.

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Proposals should be mailed or hand-delivered in a sealed envelope marked “RFP# xxxxxx” to:

RI Dept. of Administration
Division of Purchases, 2nd floor
Pena Center Hall

RFP Timeline

From: "McIntyre, Nancy (DOA)" [REDACTED] >
To: "Thorsen, Jim (DOA)" [REDACTED] >
Date: Mon, 15 Mar 2021 21:06:35 -0400
Attachments: critical-information-to-include-in-rfp.docx (41.86 kB); procurement-needs-assessment-worksheet.docx (40.01 kB)

Jim,

I've attached a couple of helpful documents for RFP's.

Per your request, the RFP timeline is stated below.

The typical timeframe for an RFP spans 75 days or more and consists of the following phases:

- Phase 1: Post for 28 days
 - Phase 2: Evaluation (Technical and Cost) – up to 3 weeks (agencies often take months to evaluate proposal submissions)
 - Phase 3: Tentative Selection Letter – up to 21 days
 - Phase 4: Issuance of Purchase Order- up to 5 days
-

How we will truncate this process for the Governor's Covid/Educational Initiative RFP:

Phase 1: Post for 21 days (critical that the scope of work and requirements are well defined, little margin for error, Purchases allow for question/answer period – require 5 days from bid opening to post an addendum; otherwise need to extend bid opening; include any special insurance provisions if greater than General Conditions of Purchase Addendum A Assigned buyer conducts bid opening and performs a cursory review of proposals along with Bidder Certification Cover forms; forwards proposals to chair of Technical Evaluation Committee (TEC)
Risk – At time of bid opening, firm(s) does not agree to our General Conditions of Purchase which is the basis for our contract.

While solicitation is on the street:

Assign Chair of TEC

Chair collects conflict of interest forms from all evaluation team members including those that may serve in an advisory capacity

Schedule technical/cost evaluation review meetings

Evaluation team members must read and familiarize themselves with the RFP in its entirety prior to the bid opening

Phase 2: Complete evaluation process in 5 days

Technical Review Committee reads all technical proposals in two days

Technical Review Committee meets to score technical proposals in one day

Chair of Committee prepares technical evaluation memo and sends to Purchases for recommendations and release of cost proposals in one day

Cost proposals are reviewed and scored including ISBE (MBE form); Chair prepares final evaluation memo to Purchases for review and issuance of Tentative Selection Letter

Phase 3: Tentative Selection Letter – request documents within 5 days including insurance, Affirmative Action Plan and any other documents as well as OSP vendor registration

Time is significantly reduced in post evaluation phase since separate contract is no longer required; firms are agreeing to General Conditions of Purchase at time of proposal submission

Risk – receipt of Affirmative Action Plan – this often causes delay in award process

Phase 4: Issuance of Purchase Order in 1 day

Purchases will commit to issuing purchase order same day as final receipt of all documents

Total Time: 32 days

Let me know if you have any questions.

Best,
Nancy

Nancy R. McIntyre
State Purchasing Agent
State of Rhode Island

Completing this worksheet allows your team to translate important takeaways from the “needs assessment” stage of procurement into a solicitation document. Ensuring your solicitation document clearly communicates the answers to each question below sets your contracts up to achieve better outcomes for your department.

Advance Strategic Priorities <i>Align the procurement with department strategy and program goals</i>	Encourage Innovation <i>Articulate a vision of success while leaving appropriate flexibility for creative solutions</i>	Prepare for Active Contract Management <i>Set the stage for collaborating with vendors to use data and improve performance over time</i>
1. What is the problem this procurement is intended to help address? Specifically: <ol style="list-style-type: none"> What outcome goal(s) is the department trying to make progress on? What is the gap between where we are today and where we want to be? 	5. What elements of the scope of work are required?	8. What language will you include in the draft contract attached to the RFP to communicate your department’s expectations for vendors around the performance objectives and priorities defined in question 1?
2. How will you measure whether you have made progress on the goal(s) you defined in question 1? Specifically: <ol style="list-style-type: none"> Which metrics can be used in the RFP to orient vendors toward your vision of success? 	6. Where could you adjust the scope of work to allow vendors flexibility to develop innovative solutions? <ol style="list-style-type: none"> Which specifications and requirements can be loosened or eliminated? How can you shift focus to “what” the department is trying to achieve, rather than limiting “how”? Where can you ask vendors to use their expertise to propose an appropriate standard, rather than imposing one? 	9. What expectations around reporting, meeting, and data will you include in both the RFP and the attached draft contract to set vendors up for Active Contract Management and continual performance improvement?
3. Who is the target population, or intended users, for this product or service? Describe this population and their needs.	7. Which priorities are most important to integrate into scoring criteria? Consider: <ol style="list-style-type: none"> Measuring past performance, if appropriate Asking vendors to justify the proposal’s potential to achieve the goal(s) identified in question 1 	10. What contract and payment structure best aligns vendor incentives with cost-effective performance? Where might there be opportunities to link provider payments to results? What contract term or length is most appropriate?
4. What other insights came out of your needs assessment work (see the “Needs Assessment Worksheet” on the ARC ¹) that would help potential vendors prepare useful and creative proposals? Use the RFP to clearly communicate these.		11. What are the biggest risks to the success of this procurement and contract? How will you mitigate these?

¹ <https://www.purchasing.ri.gov/StateAgencyInfoCenter/AgencyLogin.aspx>

Example responses for an RFP for services to help elderly individuals live at home

Advance Strategic Priorities

1. (a) *Outcome goals: We seek to enable at-risk elderly individuals to safely live at home, with improved quality of life, by preventing physical health crises that often lead to permanent moves into expensive long-term residential nursing facilities.*

(b) *Currently:*

- *62% of elderly population is living at home, compared to a regional average of 70%, and a leading neighboring state's average of 96%*
- *The share of the state's budget spent on preventable ER visits for seniors has steadily increased for 3 yrs*
- *Few of our services are oriented toward prevention; most of our resources pay for recovery services once a crisis has already occurred*

2. *Possible metrics:*

- *Number of ER visits among seniors for preventable injuries, such as injuries associated with falls at home*
- *Clients at home, 3-months and 12-months following referral for services*
- *Improvement in well-being, as measured by pre- and post-service assessment on healthy aging indicators*
- *Percentage of clients who are assessed as at most high-risk for nursing stays*

3. *Our data show there are 800,000 citizens over the age of 60 who are often living with chronic conditions such as heart disease, physical disability, or Alzheimer's disease. This population has increased difficulty living independently and is frequently experiencing behavioral or physical health crises.*

4. *The biggest challenge the state has is identifying especially high-risk individuals to offer at-home, preventative services before a crisis occurs. We are looking for vendors to suggest innovations not previously available that can help identify, assess, and intervene with at-risk individuals early.*

Encourage Innovation

5. *Required elements:*

- *Assessment of all elderly individuals within their geographic catchment area who are involved with the Department or who are referred*
- *Use formal assessments to inform service needs*
- *Centralized mechanisms to accept referrals from healthcare providers 24 hours a day, 365 days per year*
- *Provider's staff must meet any applicable licensing regulations by the state and provider must have Medicaid provider billing capability*
- *Provider must have the capacity to collect, manage, and report data electronically to the Department for managing program performance*

6. *Opportunities for innovation:*

- *Previously, we've required all clients to be assessed within the same timeframe. In this RFP, we will allow providers to propose a triage system that could focus resources on clients at highest-risk.*
- *Previously we've asked only for immediate, in-home responses to the sudden onset of problematic behaviors or crises. In this RFP, we will leave room for providers to propose other approaches, such as preventive or diversionary services.*
- *Previously we've specified the staffing levels and qualifications of the provider service teams. In this RFP, we will ask providers to propose the right size and mix of personnel for teams to effectively address the goals we want the program to achieve, as stated in question 1.*

7. *Integration of priorities into scoring:*

- *The RFP will include case study style questions around how a provider would work with each of three example seniors experiencing different issues. The first of these three cases, for example: "During a follow-up visit, you consult with a 78-year-old man who has a history of congestive heart failure, arthritis, depression, and difficulty sleeping. He takes several prescription medications for these conditions as well as over-the-counter sleep and allergy medications. While his chronic conditions appear*

to be stable, his wife tells you that he has fallen twice over the last 4 months. Please describe your approach for this client.”

- *The RFP will ask providers to submit data that reflects their ability to achieve results in preventing crisis situations when they’ve served similar populations in the past.*
- *This RFP will ask vendors to use the evidence base for their approach to justify the likelihood that the approach will increase elder quality of living, decrease preventable ER visits, and decrease long-term nursing home stays.*

Prepare for Active Contract Management

8. *The draft contract attached to the RFP will:*

- *Identify the target population: “The Target Population shall consist of individuals over the age of 60 residing in the State.”*
- *Set expectations for referrals from the target population: “The contractor will identify and screen the target population residing in the geographic catchment area for eligibility for services under the criteria set forth in Appendix XX.”*
- *Define program goals the contract is intended to make progress against, as stated in question 1: “The purpose of this contract to reduce preventable ER visits for seniors, reduce moves into long-term residential nursing facilities, and improve the quality of life for our elderly population.”*

9. *The RFP will include an appendix detailing three general principles of Active Contract Management based upon the DOA template.*

The draft contract attached to the RFP will include an appendix that lays out expectations of the vendor and the Department in managing performance of the program over the life of the contract. This appendix will:

- *Define key performance objectives that the services are intended to accomplish*
- *Outline responsibilities of the contractor and the Department regarding data collection, reporting, analysis, the schedule of such activities*
- *Set expectations for regular meetings between the contractor and Department to improve program performance, including meeting cadence, attendance, tone and objectives*
- *Clarify understanding around the Department’s use of data to guide program development, evaluate programs, inform policies, and inform contract decisions*

10. *Contract and payment structure:*

- *Because there are substantial fixed costs involved in outreach and providing service coverage for an entire region, this contract will be a cost-reimbursement contract up to a maximum annual amount for each region, rather than a per-unit type contract.*
- *There will be opportunities to earn up to additional 5% in bonus payments based upon number of referred clients who are at home 6 months following services, in order to make sure the department is providing information to providers about what happens after the client is cared for.*
- *The term of the contract will be for three years, with two one-year options to extend. This will allow sufficient time to work with providers throughout the initial three years to collect data and improve performance. The options provide incentive for providers who are performing well.*

11. *Risk mitigation*

- *Risk: Vendors won’t recognize the innovations we are seeking and will submit proposals for the same services previously offered. Strategy: We will hold a vendor “town hall” event before releasing the RFP to explain our vision and rationale for program changes.*
- *Risk: Vendors may miss how much we are expecting them to be responsible for identifying clients. Strategy: We include this in an “introduction” section that summarizes how this RFP is different from services offered previous years.*
- *Risk: We may not have the right vendors in our community for this and need new options or creative solutions to achieve the goals we’ve laid out. Strategy: We will publicize the vendor town hall event and RFP itself with national provider associations. We will explicitly call out the need for new approaches in the RFP and loosen requirements in the scope of work to allow for different and more creative solutions.*

Completing this worksheet allows your team to map out what you need to procure and why. This information can then be used to present the business case to internal stakeholders, identify outstanding questions, and gather consensus. Ultimately, your team's answers to these questions should closely inform the solicitation for this procurement. See the reverse side for example responses.

Scope the need for this procurement	Explore potential solutions	Prepare the vendor community
<p>1. (a) Consider your agency's mission and the larger program of which the product or service you're procuring will be a part. Name at least three long-term goals this program is trying to achieve.</p> <p>(b) How will the product or service you're procuring contribute to achieving these goals?</p>	<p>4. (a) What strategies are you using to search for potential solutions that could bring about the results you described in question 2?</p> <p>(b) Based on your search, what different approaches exist? Are there any new or innovative methods worth considering?</p>	<p>7. How are you closing the information gap between your department and vendors regarding the goals you described in question 1, the desired results you listed in question 2, and the problems you identified in question 3?</p>
<p>2. Imagine your department in the future, reflecting upon a completely successful implementation of the product or service you're procuring. What are the most important results you'll be celebrating?</p>	<p>5. (a) How are you determining which of the solutions you identified in question 4 are most appropriate for your context and most likely to bring about the desired results? (I.e., research, evidence, stakeholder interviews.)</p> <p>(b) Based on this work, what appear to be the most promising strategies?</p>	<p>8. What tactics are you using to expand the number of vendors who are likely to respond to your solicitation, and also to get new ideas from existing vendors?</p>
<p>3. Consider the product or service that's currently in place, or the way in which your department imperfectly addresses these goals today. Name at least three things that are going well with this approach that you'd like to continue, and name at least three things that <i>are not</i> going well and need to change.</p>	<p>6. How are you testing the approaches that you identified in question 5 (b), and checking your assumptions, to validate which strategies will work?</p>	

Example Responses (for illustrative purposes only)

Scope the need for this procurement	Explore potential solutions	Prepare the vendor community
<p>1. <i>The Department of Aging’s mission is to preserve the independence, dignity, and capacity for choice of seniors in our state.</i></p> <p><i>Program Goals:</i></p> <ol style="list-style-type: none"> 1. Reduce costly ER interventions for seniors 2. Reduce moves into long-term residential nursing facilities 3. Improve the quality of life for our elderly <p>(b) <i>Providing short-term home-based support services for elderly individuals experiencing a crisis will help avoid emergency room visits and decrease transitions into nursing homes, thus improving quality of life.</i></p>	<p>4. • <i>RFI to ask provider community which approaches would best support the mission articulated in Q1</i></p> <p>(a) • <i>Consulting Neighboring State X, a leader in this space, on strategies they’ve used to reduce ER visits and long-term residential care among their elderly population.</i></p> <p>(b) • <i>Neighboring State X contracts with providers to provide short-term, home-based support services for elderly individuals experiencing a crisis</i></p> <ul style="list-style-type: none"> • <i>Some approaches allow providers to make referrals to other community-based and in-home service providers</i> • <i>Other approaches have the contracted providers deliver all the services themselves.</i> 	<p>7. • <i>RFI prompting bidders to recommend alternative solutions to the state’s current approach.</i></p> <ul style="list-style-type: none"> • <i>Town Hall for vendors to discuss and ask questions about the agency’s priorities, vision, and current challenges.</i> • <i>Pre-bid conference for potential vendors to ask specific questions about this RFP.</i> • <i>Internal partners who are unfamiliar with this program will review the RFP in order to ensure the RFP is easy to understand and respond to.</i>
<p>2. <i>Compared to today, in three years:</i></p> <ul style="list-style-type: none"> • <i>Reduce nursing home population by 20%</i> • <i>30% fewer preventable ER visits</i> • <i>20% improvement in “healthy aging” indicators in every district in our state</i> • <i>40% fewer complaints</i> 	<p>5. • <i>RFI asked providers to present compelling evidence on how their program(s) will have a meaningful and observable impact on the elderly.</i></p> <p>(a) • <i>Consulting with an academic expert about her research on promising elder care approaches.</i></p> <ul style="list-style-type: none"> • <i>Intern conducted a literature review and broad market research on elder care best practices.</i> <p>(b) • <i>Assess people within set geographic areas to identify all those in need, rather than only those in the ER</i></p> <ul style="list-style-type: none"> • <i>Use industry-accepted “healthy aging” indicators in risk assessments to match individuals to services</i> • <i>Use web-based platforms for enrollment and assessment to allow for ease of data use</i> • <i>Re-assess clients when they complete services</i> 	<p>8. • <i>We designed and sent out a survey to ask providers about their experiences responding to prior state solicitations (or their decisions not to respond). Insights from this survey will inform changes to the RFP to lower barriers to responding.</i></p> <ul style="list-style-type: none"> • <i>We are organizing the scope of work into a 4 different functional components, and allowing vendors to bid on one or all of these. This will allow smaller or more specialized vendors to respond.</i> • <i>In addition to sending the RFP to a list of the current providers, we will market it on national and local listservs for the provider associations in the elderly affairs space.</i>
<p>3. <i>Currently going well:</i></p> <ul style="list-style-type: none"> • <i>Collaborative data-sharing among nursing homes to track admittance & stay data</i> • <i>Well-liked marketing campaign to teach caregivers safe home practices for seniors</i> • <i>Seniors get good care in Emergency Rooms</i> <p><i>Not currently going well:</i></p> <ul style="list-style-type: none"> • <i>Elderly individuals arrive at the ER with preventable illnesses and injuries</i> • <i>Can’t identify seniors at risk for ER visits</i> • <i>Funding only used for responding to, rather than preventing, incidents</i> 	<p>6. • <i>“Assumption buster” exercise with agency staff to get feedback on the need is for this procurement and which approaches seem most promising.</i></p> <ul style="list-style-type: none"> • <i>A one-day meeting with vendors to do a proof-of-concept challenge where potential vendors design a better assessment algorithm, based on sample data.</i> 	

FW: Call w/ Jim Thorsen re: RFP

Where: Conference Line: 1-866-692-3158 Participant PIN: 25706924#
When: Tue Mar 16 16:30:00 2021 (America/New_York)
Until: Tue Mar 16 17:00:00 2021 (America/New_York)
Organisers "Afonso, Antonio (GOV)" </o=exchangelabs/ou=exchange administrative group (fydibohf23spdlt)/cn=recipients/cn=406c73c4a34b4d7c8b49c60738cefd77-antonio afo">
Required Attendees: "McIntyre, Nancy (DOA)" [REDACTED]

From: Afonso, Antonio (GOV) <[REDACTED]>
Sent: Tuesday, March 16, 2021 2:05:02 PM (UTC-05:00) Eastern Time (US & Canada)
To: Afonso, Antonio (GOV); Thorsen, Jim (DOA); Aieskoll, Alice (DOA)
Subject: Call w/ Jim Thorsen re: RFP
When: Tuesday, March 16, 2021 4:30 PM-5:00 PM.
Where: Conference Line: 1-866-692-3158 Participant PIN: 25706924#

One Tap: 1-866-692-3158,,25706924#

From: [McIntyre, Nancy \(DOA\)](#)
To: [Lennon, Nina \(DOA\)](#)
Cc: [Skelly, Meredith \(DOA\)](#); [Missell, Katherine \(DOA\)](#)
Subject: Fwd: School Reopening RFP
Date: Friday, March 19, 2021 9:54:44 AM
Attachments: [Scope of Work \(Clean\) 3.19.21.doc.docx](#)

Nina,
We can discuss at our 1:1 today.

Meredith and Kathy,
Fyi

p.s. UPDATE - The OSP Bid Board is LIVE. Active Open Enrollments (formerly continuous recruitments) are posted to the Bid Board. OSP Login is LIVE at <https://www.ridop.ri.gov/osp-login/> . View all Bidding Opportunities at <https://www.ridop.ri.gov/solicitations/> . Vendor Registration remains available at <https://www.ridop.ri.gov/osp/osp-vendor-registration.php> .

Thank you,

Nancy R. McIntyre

State Purchasing Agent

State of Rhode Island - Division of Purchases

One Capitol Hill, 2nd Floor, Providence, RI 02908-5855

Website: www.ridop.ri.gov [Come and check out our newly designed site!]

Phone: [REDACTED]

Email: [REDACTED]

If you need immediate attention, please contact my assistant Kelley Connors at [REDACTED] or [REDACTED]

From: Afonso, Antonio (GOV) <[REDACTED]>
Sent: Friday, March 19, 2021 9:52:17 AM
To: Thorsen, Jim (DOA) <[REDACTED]> McIntyre, Nancy (DOA) <[REDACTED]>
Subject: School Reopening RFP

Jim and Nancy,

Attached is the Scope of Work for the School Reopening RFP we have discussed. Please have someone work this into the appropriate State RFP format and furnish me with a draft by Monday morning as I will need to review and edit the document. Please be sure that the total processing time included in the document is consistent with the 32 days we discussed. Let me know if you need anything else.

Tony

Draft 3.19.21

Scope of Work

The State of Rhode Island is issuing a request for proposals from potential vendors/consultants with respect to various aspects of the K-12 public schools reopening plan. Components of the project for which proposals are being sought include:

- i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening;
- ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;
- iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;
- iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State to address lost learning and catch up and long-term learning programs;
- v. program design, analysis and evaluation backed with empirical data for municipal programs and state school reopening;
- vi. equity review and initiatives;
- vii. development of metrics and accountability of outcomes relevant to program implementation and organization;
- viii. higher education needs assessment relative to in person reopening of state colleges and universities, and
- ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.

From: [McIntyre, Nancy \(DOA\)](#)
To: [Lennon, Nina \(DOA\)](#)
Subject: Fwd: School Re-opening RFP
Date: Monday, March 22, 2021 2:43:21 PM
Attachments: [Scope of Work \(Redlined\) 3.22.21.docx](#)

I haven't even opened yet but please take a look.

Thx!

p.s. UPDATE - The OSP Bid Board is LIVE. Active Open Enrollments (formerly continuous recruitments) are posted to the Bid Board. OSP Login is LIVE at <https://www.ridop.ri.gov/osp-login/> . View all Bidding Opportunities at <https://www.ridop.ri.gov/solicitations/> . Vendor Registration remains available at <https://www.ridop.ri.gov/osp/osp-vendor-registration.php> .

Thank you,

Nancy R. McIntyre

State Purchasing Agent

State of Rhode Island - Division of Purchases

One Capitol Hill, 2nd Floor, Providence, RI 02908-5855

Website: www.ridop.ri.gov [Come and check out our newly designed site!]

Phone: [REDACTED]

Email: [REDACTED]

If you need immediate attention, please contact my assistant Kelley Connors at [REDACTED]
or [REDACTED]

From: Afonso, Antonio (GOV) <[REDACTED]>
Sent: Monday, March 22, 2021 2:35:09 PM
To: Thorsen, Jim (DOA) <[REDACTED]> McIntyre, Nancy (DOA)
<[REDACTED]>
Subject: School Re-opening RFP

Per my discussions of today, including with Tom McCarthy, please find a redlined revision of the scope of work to be inserted into the RFP draft. When will I receive the RFP draft for review and editing?

Draft 3.22.21

Scope of Work

The State of Rhode Island is issuing a request for proposals from potential vendors/consultants with respect to various aspects of the K-12 public schools reopening plan. Components of the project for which proposals are being sought include:

- i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;
- ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;
- iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;
- iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;
- v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;
- vi. equity review and initiatives;
- vii. development of metrics and accountability of outcomes relevant to program implementation and organization;
- viii. higher education needs assessment relative to in person reopening of state colleges and universities, and
- ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.

From: [Licht, Jeremy \(DOA\)](#)
To: [Afonso, Antonio \(GOV\)](#); [Thorsen, Jim \(DOA\)](#)
Cc: [McCarthy, Thomas \(RIDOH\)](#); [McIntyre, Nancy \(DOA\)](#)
Subject: RE: RFP and documents requested
Date: Tuesday, March 23, 2021 4:59:00 PM
Attachments: [CLEAN Reopening schools RFP draft \(JL 3.23.21 12.17P\).docx](#)
[Reopening schools RFP draft \(JL 3.23.21 12.17P\).docx](#)

Tony,

Attached is a track changes version of the document, along with a clean version. The clean version may be easier to read. The substantive changes in Section B.

Jeremy

From: Afonso, Antonio (GOV) <[REDACTED]>
Sent: Tuesday, March 23, 2021 4:57 PM
To: Thorsen, Jim (DOA) [REDACTED]; Licht, Jeremy (DOA) [REDACTED] >
Cc: McCarthy, Thomas (RIDOH) [REDACTED]; McIntyre, Nancy (DOA) [REDACTED]
Subject: RE: RFP and documents requested

I don't understand where these changes would be inserted and need to see them in a document before being able to sign off.

From: Thorsen, Jim (DOA) <[REDACTED]>
Sent: Tuesday, March 23, 2021 4:33 PM
To: Licht, Jeremy (DOA) [REDACTED] >; Afonso, Antonio (GOV) [REDACTED] >
Cc: McCarthy, Thomas (RIDOH) <[REDACTED]>; McIntyre, Nancy (DOA) [REDACTED]
Subject: Re: RFP and documents requested

Tony,

If you are okay with these changes, we can get this posted tonight.

jet

From: Licht, Jeremy (DOA) [REDACTED] >
Sent: Tuesday, March 23, 2021 1:51 PM
To: Thorsen, Jim (DOA) [REDACTED] >; Afonso, Antonio (GOV) [REDACTED] >
Cc: McCarthy, Thomas (RIDOH) [REDACTED] >
Subject: RE: RFP and documents requested

Tony and Jim,

I have reviewed the draft RFP and have taken the liberty of providing some substantive feedback based on my understanding of the Governor's goals for this RFP. In the main, I revised the scope of work into 3 major "Tasks" in order to facilitate the organization and review of proposals. The three tasks are as following:

1. Strategic Planning for Resumption of Full, In-Person Learning
2. School COVID-19 Testing Strategy and Project Management
3. Comprehensive Consulting Services for the Development and Implementation of a Strategic Plan to Mitigate Learning Loss

These three tasks seemed distinct to me, though obviously interrelated.

In addition, I have asked my Massachusetts counterpart if MA has done comparable RFPs to see if we could get some models that might have useful information we can incorporate.

Jeremy

From: Thorsen, Jim (DOA) <[REDACTED]>
Sent: Tuesday, March 23, 2021 11:23 AM
To: Licht, Jeremy (DOA) <[REDACTED]>; McCarthy, Thomas (RIDOH) <[REDACTED]>
Subject: FW: RFP and documents requested
Importance: High

Tom/Jeremy

Sending you a draft, because you are likely to be on the selection committee.

Feedback?

jet

James E. Thorsen

Acting Director of Administration

State of Rhode Island

[REDACTED] (o)

[REDACTED] (c)

From: McIntyre, Nancy (DOA) <[REDACTED]>
Sent: Tuesday, March 23, 2021 11:13 AM
To: Thorsen, Jim (DOA) <[REDACTED]>; Afonso, Antonio (GOV) <[REDACTED]>
Cc: 'Nina Lennon' <[REDACTED]>
Subject: RFP and documents requested
Importance: High

Director and Tony,

Attached are the documents and links that will accompany this RFP. Nina suggested we include the Business Associate Agreement because of the metrics component that possibly could touch upon PII or PHI. If you believe that is not necessary we will not include. As I mentioned before, our General Conditions of Purchase becomes our contract so there is no time needed on the back end for contract preparation.

Please provide me a list of firms that you would like for us to notify.

I've included the link of our General Conditions of Purchase and Addendum A for insurance below.

[General Conditions of Purchase \(220-RICR-30-00-13\) - Rhode Island Department of State](#)

[general-conditions-addendum-a.pdf \(ri.gov\)](#)

Tony, I see that you called my office phone yesterday afternoon. I was teleworking yesterday but am always reachable by cell. My work cell is [REDACTED] and my personal cell is [REDACTED]. Feel free to use either of those numbers in the future. I replied to your question regarding the timeline in the RFP document. Those dates will be populated shortly at time of posting. Nina Lennon will also provide a detailed timeline for your reference after she posts the solicitation.

Best,
Nancy

Nancy R. McIntyre
State Purchasing Agent
State of Rhode Island



RFP - AGENCY SOLICITATION SPECIFICATIONS

HEADER

DEPARTMENT OF ADMINISTRATION

TITLE: K-12 SCHOOL AND HIGHER EDUCATION REOPENING PLAN CONSULTING SERVICES

DESCRIPTION: COORDINATION OF COVID 19 RESPONSE, ACCELERATION OF IN PERSON LEARNING AND LEARNING CATCH UP

PRE-BID/ PROPOSAL CONFERENCE: NO

BONDING REQUIREMENTS

BID SURETY BOND REQUIRED: NO

PAYMENT AND PERFORMANCE BOND REQUIRED: NO

CONTRACT TERMS

The initial contract period will begin approximately **April 15, 2021** for **one (1) year**. Contracts may be renewed for up to two **additional 12-month** periods based on vendor performance and the availability of funds.

Insurance Requirements

In accordance with this solicitation, or as outlined in Section 13.19 of the General Conditions of Purchase, found at <https://rules.sos.ri.gov/regulations/part/220-30-00-13> and General Conditions - Addendum A found at <https://www.ridop.ri.gov/documents/general-conditions-addendum-a.pdf>, the following insurance coverage shall be required of the awarded vendor(s):

General Requirements:

- 13a) Liability - combined single limit of \$1,000,000 per occurrence, \$1,000,000 general aggregate and \$1,000,000 products/completed operations aggregate.
- 13b) Workers compensation - \$100,000 each accident, \$100,000 disease or policy limit and \$100,000 each employee.
- 13c) Automobile liability - \$1,000,000 each occurrence combined single limit.
- 13d) Crime - \$500,000 per occurrence or 50% of contract amount, whichever is greater.

Professional Services:

- 13e) Professional liability (“errors and omissions”) - \$2,000,000 per occurrence, \$2,000,000 annual aggregate.
- 13f) Environmental/Pollution Liability when past, present or future hazard is possible - \$1,000,000 per occurrence and \$2,000,000 aggregate.
- 13g) Working with Children, Elderly or Disabled Persons – Physical Abuse and Molestation Liability Insurance - \$1 Million per occurrence.

Information Technology and/or Cyber/Privacy:

- 13h) Technology Errors and Omissions - Combined single limit per occurrence shall not be less than \$5,000,000. Annual aggregate limit shall not be less than \$5,000,000.
- 13i) Information Technology Cyber/Privacy – minimum limits of \$5,000,000 per occurrence and \$5,000,000 annual aggregate. If Contract Party provides:
- a) key back office services Contract Party shall have a minimum limit of \$10,000,000 per occurrence and \$10,000,000 annual aggregate;
 - b) if Contract Party has access to Protected Health Information as defined in HIPAA and its implementing regulations, Personal Information as defined in in R.I. Gen. Laws § 11-49.3-1, et seq., or as otherwise defined in the Contract (together Confidential Information”), Contract Party shall have as a minimum the per occurrence, per annual aggregate, the total rounded product of projected number of persons data multiplied by \$25 per person breach response expense per occurrence; but no less than \$5,000,000 per occurrence, per annual aggregate; or,
 - c) if the Contract Party provides or has access to mission critical services, network architecture and/or the totality of confidential data \$20,000,000 per occurrence and in the annual aggregate.

SECTION A. BACKGROUND

The Rhode Island Department of Administration Division of Purchases, on behalf of the State of Rhode Island, is issuing a request for proposals from potential vendors/consultants with respect to various aspects of the K-12 public schools reopening plan, higher education reopening plan, learning catch up services and non- LEA municipal learning programs.

Priorities – Health and Recovery

The proposed Fiscal Year 2022 budget focuses on two urgent and critical issues: protecting Rhode Islanders amid the most daunting public health crisis in a century and laying the foundation for an enduring recovery after the pandemic. The recovery is not only about gaining back the jobs Rhode Island has lost, but also working to alleviate the full scope of hardships inflicted upon our citizens, businesses, and cities and towns. The burdens of this crisis have fallen disproportionately on the most vulnerable citizens of our state: small business owners, students and teachers, those with mental and physical illnesses, minority communities, and the economically disadvantaged. The Administration’s budgetary priorities reflect the belief that equity must be a guiding principle as the state drives forward.

COVID-19 Pandemic Response

Since the pandemic emerged in 2020, the State of Rhode Island continues to employ an aggressive and targeted response to address the wide array of impacts the pandemic has had on individuals, municipalities, school districts, institutions of higher education, small businesses, nonprofit organizations, and many others. Mitigating the effects of the pandemic requires a coordinated effort that controls the spread of the virus, addresses its impacts on individuals and businesses, and builds on the existing infrastructure to sustain the response as long as it is needed. The State must oversee the efficient use of all available resources - including multiple sources of federal funds - to accelerate and sustain the recovery. In addition to vaccinations, testing, contact tracing, alternative hospital sites and other support for Rhode Islanders, COVID-19-related spending has included funding for programs, including business inspections, communications, data, government readiness, health system support, legal, supplies, and technology enablement.



RI Schools and Recovery

There are 66 public Local Education Agencies (LEAs) or districts in Rhode Island. These include, but are not limited to:

- 32 regular school districts (single municipalities)
- 4 regional school districts (more than one municipality)
- 4 state-operated schools (statewide)
- 1 regional collaborative LEA
- 23 charters

The Rhode Island public elementary and secondary education system:

- provides education to approximately 143,000 students each year.
- has a cumulative annual budget of \$ 2.2 billion
- employs approximately 21,000 teachers, administrators and staff.

The Rhode Island Department of Education (RIDE), Rhode Island Department of Health (RIDOH), and the LEAs worked hard to ensure delivering on the promise of a high-quality education in the 2020-2021 school year.

RIDE provided the LEAs with planning guidance and asked that each prepare for a full range of scenarios – from full in-person to distance learning. RIDE developed reopening metrics to determine which scenario could be most safely implemented and stood up an Education Operations Center to support school communities in real time as issues arise.

Moving to the recovery phase of the pandemic, assistance is needed to consolidate oversight and coordination of School related recovery activities.

SECTION B: SCOPE OF WORK AND REQUIREMENTS

The State seeks a consulting service provider or providers to undertake aspects pertaining to the return to full, in-person learning for Rhode Island elementary and secondary schools and institutions of higher education. The Scope of Work may include the following tasks, though the State reserves the right to award less than all of the tasks outlined below. Providers may bid on one or more of the Tasks outlined below, or may partner with other providers to provide a comprehensive bid on all three tasks. If a provider bids on less than all three tasks, the provider should describe in its proposal how it would integrate its efforts with those of providers performing the other tasks.:

Task 1: Strategic Planning for Resumption of Full, In-Person Learning

This task involves advising the State of Rhode Island government from the Governor through and including the Rhode Island Department of Education, the Rhode Island Office of the Postsecondary Commissioner, and the Rhode Island Department of Health with respect to all aspects of elementary and secondary school and higher education reopening activities, including strategy, organization, and communication. The goal of this task is to facilitate a strategic plan for a return to full, in-person learning by providing expert advice on strategy and implementation, coordinating and synthesizing stakeholder feedback, and communicating decisions, guidance, and goals. This task would include:

- Designing and organizing an effective process for developing a comprehensive reopening strategy
- Ensuring inclusion of all stakeholders (public health officials, community, parents, students, staff, municipal leaders, etc) and that all have an opportunity to provide structured input, including facilitating conversations with stakeholders
- Ensuring that the strategy takes into account the needs of populations and communities most impacted by COVID-19, including methods for identifying those populations/communities and responding to their unique needs
- Supporting state agencies in gathering, organizing, analyzing, and presenting information, including reviewing existing plans and best practices developed in other states or nations
- Assisting in the development and execution of a plan to communicate the reopening strategy
- Outlining a process to ensure implementation and evaluation of the strategy, including defining measurable key performance-based indicators/metrics
- Assisting the development, drafting, and communication of relevant guidance documents for LEAs, educators, parents, education-related nonprofits, and other education-related stakeholders
- Developing strategies on the optimal use of federal COVID-19 funding from the American Rescue Plan, CARES Act, or other sources to support the strategy
- Keeping all relevant processes on track, on time and on budget

Task 2: School COVID-19 Testing Strategy and Project Management

This task involves the development of sustainable and efficient strategies for continued COVID testing through the academic year in both elementary and secondary and higher education settings, as required by the public health necessity and while vaccines are developed and approved for children under the age of 16. This would include planning for, organizing, project managing, and communicating to stakeholders the strategy for ongoing COVID-19 testing. Proposers should

address the strategies to be used, including whether pooled testing or other methods should be used as component of the testing program, the proposed organizational structure of the testing program.

Task 3: Comprehensive Consulting Services for the Development and Implementation of a Strategic Plan to Mitigate Learning Loss

This task involves the development and implementation of a multiyear, statewide strategy to address learning loss resulting from the COVID-19 pandemic. This task should involve:

- Designing and organizing an effective process for developing a comprehensive learning loss mitigation strategy
- Ensuring inclusion of all stakeholders (public health officials, community, parents, students, staff, municipal leaders, etc) and that all have an opportunity to provide structured input, including facilitating conversations with stakeholders
- Ensuring that the strategy takes into account the needs of populations and communities most impacted by COVID-19, including methods for identifying those populations/communities and responding to their unique needs
- Supporting RIDE in gathering, organizing, analyzing, and presenting information, including reviewing existing strategies and best practices developed in other states or nations
- Developing programming models, backed by research and empirical data, that LEAs or municipalities could use, including in-school programming, after-school programming, and summer programming, and providing technical assistance to LEAs or municipalities to help implement that programming
 - As part of this component, the State is particularly interested in the proposer's experience with or ideas for the development and implementation of municipal learning programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;
- Assisting in the development and execution of a plan to communicate the learning loss mitigation strategy
- Outlining a process to ensure implementation and evaluation of the strategy, including defining measurable key performance-based indicators/metrics
- Assisting the development, drafting, and communication of relevant guidance documents for LEAs, educators, parents, education-related nonprofits, and other education-related stakeholders
- Developing strategies on the optimal use of federal COVID-19 funding from the American Rescue Plan, CARES Act, or other sources to support the strategy
- Keeping all relevant processes on track, on time and on budget

SECTION C: PROPOSAL

1. Technical Proposal

Narrative and format: For each Task in the Scope of Work that a vendors seek to bid on, the vendor must submit a technical proposal which addresses each of the following elements and is limited to twenty-five (25) pages (this includes any appendices and as appropriate, resumes of key staff that will provide services covered by this request):

- A. **Staff Qualifications** – Provide staff resumes/CV and describe qualifications and experience of key staff who will be involved in this project, specifically highlighting their experience in (1) health care consulting (2) education consulting, (3) planning and logistics of complicated projects.
- B. **Capability, Capacity, and Qualifications of the Vendor** - Please provide a detailed description of the Vendor’s experience as a project coordinator in multiple states across the United States, including augmentation of existing services listing public education experience. List a minimum of three (3) relevant client references, to include client names, addresses, contact names with emails and phone numbers, dates of service and type(s) of service(s) provided.
- C. **Work Plan** - Please describe in detail, the framework within which requested consulting services will be performed. The elements listed in the Scope of Services should be included.
- D. **Approach/Methodology** –Describe the methodology to be used. Highlight the planning, program development and implementation of municipal learning programs of Cities and Towns in the State, including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs; program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening.

2. Cost Proposal

Budget and Budget Narrative:

For each Task in the Scope of Work that a vendor seeks to bid on, the vendor must provide a detailed cost proposal for the required services which includes hourly rates and estimated time allotment by month, for one year. Provide an estimate of the total contract value.

3. ISBE Proposal

See Appendix A on the “Overview” tab in Ocean State Procures™ for information and the MBE, WBE and/or Disability Business Enterprise Participation Plan form(s). Vendors are required to

complete, sign and submit these forms with their overall proposal. Please complete separate forms for each MBE, WBE, and/or Disability Business Enterprise subcontractor to be utilized on the solicitation.

SECTION D: EVALUATION AND SELECTION - SOLICITATION SPECIFIC

Technical proposals must receive a minimum of 50 out of a maximum of 70 points to advance to the cost evaluation phase. Technical proposals scoring less than 50 points shall not have the accompanying cost or ISBE participation proposals opened or evaluated; such proposals shall not receive further consideration.

Technical proposals scoring 70 points or higher shall have the cost proposals evaluated and assigned up to a maximum of 30 points. As total possible evaluation points are determined, vendor ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

Proposals shall be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Staff Qualifications	20 Points
Capability, Capacity, and Qualifications of the Vendor	20 Points
Work Plan	15 Points
Approach/Methodology	15 Points
Total Possible Technical Points	70 Points
Cost proposal	30 Points
Total Possible Evaluation Points	100 Points
ISBE Participation	6 Bonus Points
Total Possible Points	106 Points

See the “Requirements” tab of this solicitation for additional information on the evaluation and selection process in the “RFP Standard Specification” section.



RFP - AGENCY SOLICITATION SPECIFICATIONS

HEADER

DEPARTMENT OF ADMINISTRATION

TITLE: K-12 SCHOOL AND HIGHER EDUCATION REOPENING PLAN CONSULTING SERVICES

DESCRIPTION: COORDINATION OF COVID 19 RESPONSE, ACCELERATION OF IN PERSON LEARNING AND LEARNING CATCH UP

PRE-BID/ PROPOSAL CONFERENCE: NO

BONDING REQUIREMENTS

BID SURETY BOND REQUIRED: NO

PAYMENT AND PERFORMANCE BOND REQUIRED: NO

CONTRACT TERMS

The initial contract period will begin approximately **April 15, 2021** for **one (1) year**. Contracts may be renewed for up to two **additional 12-month** periods based on vendor performance and the availability of funds.

Insurance Requirements

In accordance with this solicitation, or as outlined in Section 13.19 of the General Conditions of Purchase, found at <https://rules.sos.ri.gov/regulations/part/220-30-00-13> and General Conditions - Addendum A found at <https://www.ridop.ri.gov/documents/general-conditions-addendum-a.pdf>, the following insurance coverage shall be required of the awarded vendor(s):

General Requirements:

- 13a) Liability - combined single limit of \$1,000,000 per occurrence, \$1,000,000 general aggregate and \$1,000,000 products/completed operations aggregate.
- 13b) Workers compensation - \$100,000 each accident, \$100,000 disease or policy limit and \$100,000 each employee.
- 13c) Automobile liability - \$1,000,000 each occurrence combined single limit.
- 13d) Crime - \$500,000 per occurrence or 50% of contract amount, whichever is greater.

Professional Services:

- 13e) Professional liability (“errors and omissions”) - \$2,000,000 per occurrence, \$2,000,000 annual aggregate.
- 13f) Environmental/Pollution Liability when past, present or future hazard is possible - \$1,000,000 per occurrence and \$2,000,000 aggregate.
- 13g) Working with Children, Elderly or Disabled Persons – Physical Abuse and Molestation Liability Insurance - \$1 Million per occurrence.

Information Technology and/or Cyber/Privacy:

- 13h) Technology Errors and Omissions - Combined single limit per occurrence shall not be less than \$5,000,000. Annual aggregate limit shall not be less than \$5,000,000.
- 13i) Information Technology Cyber/Privacy – minimum limits of \$5,000,000 per occurrence and \$5,000,000 annual aggregate. If Contract Party provides:
- a) key back office services Contract Party shall have a minimum limit of \$10,000,000 per occurrence and \$10,000,000 annual aggregate;
 - b) if Contract Party has access to Protected Health Information as defined in HIPAA and its implementing regulations, Personal Information as defined in in R.I. Gen. Laws § 11-49.3-1, et seq., or as otherwise defined in the Contract (together Confidential Information”), Contract Party shall have as a minimum the per occurrence, per annual aggregate, the total rounded product of projected number of persons data multiplied by \$25 per person breach response expense per occurrence; but no less than \$5,000,000 per occurrence, per annual aggregate; or,
 - c) if the Contract Party provides or has access to mission critical services, network architecture and/or the totality of confidential data \$20,000,000 per occurrence and in the annual aggregate.

SECTION A. BACKGROUND

The Rhode Island Department of Administration Division of Purchases, on behalf of the State of Rhode Island, is issuing a request for proposals from potential vendors/consultants with respect to various aspects of the K-12 public schools reopening plan, higher education reopening plan, learning catch up services and non- LEA municipal learning programs.

Priorities – Health and Recovery

The proposed Fiscal Year 2022 budget focuses on two urgent and critical issues: protecting Rhode Islanders amid the most daunting public health crisis in a century and laying the foundation for an enduring recovery after the pandemic. The recovery is not only about gaining back the jobs Rhode Island has lost, but also working to alleviate the full scope of hardships inflicted upon our citizens, businesses, and cities and towns. The burdens of this crisis have fallen disproportionately on the most vulnerable citizens of our state: small business owners, students and teachers, those with mental and physical illnesses, minority communities, and the economically disadvantaged. The Administration’s budgetary priorities reflect the belief that equity must be a guiding principle as the state drives forward.

COVID-19 Pandemic Response

Since the pandemic emerged in 2020, the State of Rhode Island continues to employ an aggressive and targeted response to address the wide array of impacts the pandemic has had on individuals, municipalities, school districts, institutions of higher education, small businesses, nonprofit organizations, and many others. Mitigating the effects of the pandemic requires a coordinated effort that controls the spread of the virus, addresses its impacts on individuals and businesses, and builds on the existing infrastructure to sustain the response as long as it is needed. The State must oversee the efficient use of all available resources - including multiple sources of federal funds - to accelerate and sustain the recovery. In addition to vaccinations, testing, contact tracing, alternative hospital sites and other support for Rhode Islanders, COVID-19-related spending has included funding for programs, including business inspections, communications, data, government readiness, health system support, legal, supplies, and technology enablement.



RI Schools and Recovery

There are 66 public Local Education Agencies (LEAs) or districts in Rhode Island. These include, but are not limited to:

- 32 regular school districts (single municipalities)
- 4 regional school districts (more than one municipality)
- 4 state-operated schools (statewide)
- 1 regional collaborative LEA
- 23 charters

The Rhode Island public elementary and secondary education system:

- provides education to approximately 143,000 students each year.
- has a cumulative annual budget of \$ 2.2 billion
- employs approximately 21,000 teachers, administrators and staff.

The Rhode Island Department of Education (RIDE), Rhode Island Department of Health (RIDOH), and the LEAs worked hard to ensure delivering on the promise of a high-quality education in the 2020-2021 school year.



RIDE provided the LEAs with planning guidance and asked that each prepare for a full range of scenarios – from full in-person to distance learning. RIDE developed reopening metrics to determine which scenario could be most safely implemented and stood up an Education Operations Center to support school communities in real time as issues arise.

Moving to the recovery phase of the pandemic, assistance is needed to consolidate oversight and coordination of School related recovery activities.

SECTION B: SCOPE OF WORK AND REQUIREMENTS

The State seeks a consulting service provider or providers to undertake aspects pertaining to the return to full, in-person learning for Rhode Island elementary and secondary schools and institutions of higher education. The Scope of Work may include the following tasks, though the State reserves the right to award less than all of the tasks outlined below. Providers may bid on one or more of the Tasks outlined below, or may partner with other providers to provide a comprehensive bid on all three tasks. If a provider bids on less than all three tasks, the provider should describe in its proposal how it would integrate its efforts with those of providers performing the other tasks.

Task 1: Strategic Planning for Resumption of Full, In-Person Learning

This task involves advising the State of Rhode Island government from the Governor through and including the Rhode Island Department of Education, the Rhode Island Office of the Postsecondary Commissioner, and the Rhode Island Department of Health with respect to all aspects of elementary and secondary school and higher education reopening activities, including strategy, organization, and communication. The goal of this task is to facilitate a strategic plan for a return to full, in-person learning by providing expert advice on strategy and implementation, coordinating and synthesizing stakeholder feedback, and communicating decisions, guidance, and goals. This task would include:

- Designing and organizing an effective process for developing a comprehensive reopening strategy
- Ensuring inclusion of all stakeholders (public health officials, community, parents, students, staff, municipal leaders, etc) and that all have an opportunity to provide structured input, including facilitating conversations with stakeholders
- Ensuring that the strategy takes into account the needs of populations and communities most impacted by COVID-19, including methods for identifying those populations/communities and responding to their unique needs
- Supporting state agencies in gathering, organizing, analyzing, and presenting information, including reviewing existing plans and best practices developed in other states or nations
- Assisting in the development and execution of a plan to communicate the reopening strategy
- Outlining a process to ensure implementation and evaluation of the strategy, including defining measurable key performance-based indicators/metrics
- Assisting the development, drafting, and communication of relevant guidance documents for LEAs, educators, parents, education-related nonprofits, and other education-related stakeholders
- Developing strategies on the optimal use of federal COVID-19 funding from the American Rescue Plan, CARES Act, or other sources to support the strategy
- Keeping all relevant processes on track, on time and on budget

Task 2: School COVID-19 Testing Strategy and Project Management

This task involves the development of sustainable and efficient strategies for continued COVID testing through the academic year in both elementary and secondary and higher education settings, as required by the public health necessity and while vaccines are developed and approved for children under the age of 16. This would include planning for, organizing, project managing, and communicating to stakeholders the strategy for ongoing COVID-19 testing. Proposers should

address the strategies to be used, including whether pooled testing or other methods should be used as component of the testing program, the proposed organizational structure of the testing program.

Task 3: Comprehensive Consulting Services for the Development and Implementation of a Strategic Plan to Mitigate Learning Loss



This task involves the development and implementation of a multiyear, statewide strategy to address learning loss resulting from the COVID-19 pandemic. This task should involve:

- Designing and organizing an effective process for developing a comprehensive learning loss mitigation strategy
- Ensuring inclusion of all stakeholders (public health officials, community, parents, students, staff, municipal leaders, etc) and that all have an opportunity to provide structured input, including facilitating conversations with stakeholders
- Ensuring that the strategy takes into account the needs of populations and communities most impacted by COVID-19, including methods for identifying those populations/communities and responding to their unique needs
- Supporting RIDE in gathering, organizing, analyzing, and presenting information, including reviewing existing strategies and best practices developed in other states or nations
- Developing programming models, backed by research and empirical data, that LEAs or municipalities could use, including in-school programming, after-school programming, and summer programming, and providing technical assistance to LEAs or municipalities to help implement that programming
 - As part of this component, the State is particularly interested in the proposer's experience with or ideas for the development and implementation of municipal learning programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;
- Assisting in the development and execution of a plan to communicate the learning loss mitigation strategy
- Outlining a process to ensure implementation and evaluation of the strategy, including defining measurable key performance-based indicators/metrics
- Assisting the development, drafting, and communication of relevant guidance documents for LEAs, educators, parents, education-related nonprofits, and other education-related stakeholders
- Developing strategies on the optimal use of federal COVID-19 funding from the American Rescue Plan, CARES Act, or other sources to support the strategy
- Keeping all relevant processes on track, on time and on budget

SECTION C: PROPOSAL

1. Technical Proposal

Narrative and format: For each Task in the Scope of Work that a vendors seek to bid on, the vendor must submit a technical proposal which addresses each of the following elements and is limited to twenty-five (25) pages (this includes any appendices and as appropriate, resumes of key staff that will provide services covered by this request):

- A. **Staff Qualifications** – Provide staff resumes/CV and describe qualifications and experience of key staff who will be involved in this project, specifically highlighting their experience in (1) health care consulting (2) education consulting, (3) planning and logistics of complicated projects.
-  B. **Capability, Capacity, and Qualifications of the Vendor** - Please provide a detailed description of the Vendor’s experience as a project coordinator in multiple states across the United States, including augmentation of existing services listing public education experience.
 List a minimum of three (3) relevant client references, to include client names, addresses, contact names with emails and phone numbers, dates of service and type(s) of service(s) provided.
- C. **Work Plan** - Please describe in detail, the framework within which requested consulting services will be performed. The elements listed in the Scope of Services should be included.
- D. **Approach/Methodology** –Describe the methodology to be used. Highlight the planning, program development and implementation of municipal learning programs of Cities and Towns in the State, including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs; program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening.

2. Cost Proposal

Budget and Budget Narrative:

For each Task in the Scope of Work that a vendor seeks to bid on, the vendor must provide a detailed cost proposal for the required services which includes hourly rates and estimated time allotment by month, for one year. Provide an estimate of the total contract value.

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Subject: Re: Solicitation Create Notification from State of Rhode Island: RFP21000563 K-12 School and Higher Education Reopening Plan...

From: David Irwin <[REDACTED]>

Date: 3/24/2021, 7:50 AM

To: Julia Rafal-Baer <[REDACTED]>

Wonderful!

On Mar 23, 2021, at 10:48 PM, Julia Rafal-Baer <[REDACTED]> wrote:

Hi!

It's a fixed RFP but luckily I know the person it's fixed for 😊

Already talked with Avossa about us all partnering on this one.

Will circle back but think it should be smooth!

On Mar 23, 2021, at 10:18 PM, David Irwin <[REDACTED]> wrote:

When you have a moment, let know if you have any insight into this and/or opinions on whether we should respond. It was released today and due on 4/13. We have some good existing content we could use for the proposal but it would require some work and as you know, we are quite busy right now :). Let me know what you think.

David

<RFP21000563 Reopening schools RFP.pdf>

Begin forwarded message:

From: Ocean State Procures <[REDACTED]>
Subject: Solicitation Create Notification from State of Rhode Island: RFP21000563 K-12 School and Higher Education Reopening Plan...
Date: March 23, 2021 at 5:39:21 PM EDT
To: David Irwin <[REDACTED]>
Reply-To: [REDACTED]

Ocean State Procures

Solicitation Created Notification

Solicitation RFP21000563 K-12 School and Higher Education Reopening Plan Consulting Services Created

State of Rhode Island has created Solicitation **RFP21000563 K-12 School and Higher Education Reopening Plan Consulting Services** for your review. Please follow the steps below to view and respond to this Solicitation.

- 1) [Log into Ocean State Procures](#)
- 2) Click on the Solicitations navigation menu.
- 3) Click on View Current Solicitations for State of Rhode Island.
- 4) Locate the Solicitation by entering RFP21000563 in the Opp No filter.
- 5) Click the Submit button.
- 6) Select the Solicitation by clicking on the link in the Opp No column on the left-hand side of the page.
- 7) Review the Solicitation and any required documents included. These documents contain important information required to respond to the Solicitation.
- 8) After you have reviewed all of the documents, you are required to accept them by checking the box next to each document and clicking on the Accept button.
- 9) After you have accepted all documents, you may respond to the Solicitation by clicking on the Respond (Line Items) or Attach Documents (No Line Items) tab.
- 10) You must submit your Solicitation response from the Review Response tab. Failure to submit

your response before the Solicitation End Date / Time will result in your response not being evaluated.

Please note that some Buying Organizations may not accept electronic responses. See this Solicitations Terms and Conditions for further instructions.

You may receive additional notices as this Solicitation is changed. Addenda are issued as the Solicitation progresses to Award.

IMPORTANT: This is NOT an Order. DO NOT ship any goods and/or perform any services until you receive a Purchase Order from the Buying Organization.

Need Help?

Support Team

Monday through Friday

8:00AM to 8:00PM EST (excluding holidays)

[REDACTED]

[REDACTED]

Mailing Address

Perfect Commerce

Attn: WebProcure Customer Support

One BayPort Way, Suite 120

Newport News, VA 23606

From: [Licht, Jeremy \(DOA\)](#)
To: [Pascale, Dorothy \(DOA\)](#)
Subject: FW: Education Meeting Follow Up
Date: Friday, April 2, 2021 10:59:00 AM
Attachments: [2021.04.02_ARP_Education_Background.pptx](#)

Dotty,

With the exception of finishing and circulating the letter on the ESSER Maintenance of Effort, I think my transition work on education is more or less done, subject to me giving you my files. I think on substance on what the major issues are going forward, as of today, have been laid out.

Jeremy

From: Licht, Jeremy (DOA)
Sent: Friday, April 2, 2021 10:57 AM
To: Afonso, Antonio (GOV) <[REDACTED]> Harlan, Daniel (OMB - Contractor)
<[REDACTED]> Lopes Metcalfe, Christine (GOV)
<[REDACTED]> Pascale, Dorothy (DOA)
<[REDACTED]>
Cc: Thorsen, Jim (DOA) <[REDACTED]> Ahern, Kim (GOV) <[REDACTED]>
Subject: Education Meeting Follow Up

All,

Thanks for the productive discussion this morning. Attached is an updated deck that includes all the major pots of education and child care funding from the ARP to give the broader context of this funding. I wanted to follow up and outline my understanding of the next steps in this area. Please correct/amend/supplement.

1. ESSER Generally
 - a. OMB will provide draft letter re: maintenance of effort to Governor's office next week for review
 - b. I recommend that Gov's office and OMB check in with RIDE on distribution to LEAs of ESSER II and ESSER III
2. RFP
 - a. Christine will be lead on managing the selected vendor.
 - b. OMB will work with Gov's office, with Christine on point, on potential funding for the vendor contract. OMB will provide recommendation as scope of work crystallizes. Gov's office will assist in reaching out to DOH and RIDE to tap their direct grants, if that is the desired approach.
 - c. I would recommend that Dotty and Daniel get involved on funding before contractual scope is finalized, to ensure that scope and billing mechanisms are optimized for the grants being used.
3. Mayoral Office Policy Development
 - a. Christine is lead on policy development in Gov's Office.

- b. Christine will work with Dotty and Daniel on identifying financing plan for the policy.
- c. Gov's Office and OMB will brainstorm on which state agency could house and oversee this program.

Jeremy

Jeremy Licht, Esq.

Director, Rhode Island Pandemic Recovery Office

c: [REDACTED]

Adesuyi, Doris (GOV)

From: McCarthy, Thomas (RIDOH)
Sent: Tuesday, April 13, 2021 7:54 AM
To: Silva, Anthony (GOV); McCabe, Brenna M (GOV)
Subject: FW: [EXTERNAL] : Questions for you

Importance: High

Tony,

Given that much of the below is still under development I'm not comfortable sharing externally. Pending your guidance here.

From: Mike Magee <[REDACTED]>
Sent: Monday, April 12, 2021 12:25 PM
To: McCarthy, Thomas (RIDOH) <[REDACTED]>
Subject: [EXTERNAL] : Questions for you

Hi Tom,

I have a question I'm hoping you can help me with. Several of our Chiefs for Change members across the country have reached out to us with questions about how they can best access American Rescue Plan funds so we are undertaking an effort to understand how a couple of key states - including Rhode Island - intend to deploy and/or allocate their allocation. For context, the [CDC's funding allocation document \[cdc.gov\]](#) reflects that Rhode Island will receive \$31,907,434 for testing specifically.

I'm including some specific questions below and would appreciate a connection to the person with whom my team might best follow up to learn more. Thank you for your help!

Best,

Mike

Questions

1. Does the \$31,907,434 figure match your understanding of how much money Rhode Island will receive?
2. What portion of these funds has RIDOH received as of today? By when does RIDOH expect to receive the full funding amount?
3. What specific guidance has RIDOH received regarding permissible expenditures of these funds?
4. As of today, how does RIDOH intend to use these funds?
5. What options does a school system in Rhode Island have to access these funds? Can school districts use these funds to purchase systems tools to support testing, vaccination, and symptom tracking?
6. Who should a school system in Rhode Island review if they have questions about accessing these funds?

--

Michael Magee, Ph.D. CEO

RE: [EXTERNAL] : Re: RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

From: "Lennon, Nina (DOA)" <[REDACTED]>
To: "Majcher, Daniel (DOA)" <[REDACTED]>, "McCarthy, Thomas (RIDOH)" <[REDACTED]>, "Danusis, Kristen" <[REDACTED]>, Mayors Office <[REDACTED]>
Cc: "McIntyre, Nancy (DOA)" <[REDACTED]>, "Thorsen, Jim (DOA)" <[REDACTED]>, "Shaw, Jenny (DOA)" <[REDACTED]>
Date: Wed, 14 Apr 2021 12:26:32 -0400
Attachments: Nina M_Lennon.vcf (31.15 kB)

Greetings Team:

The technical proposals were distributed this morning. You should have received two emails directly from Ocean State Procures. Please let me know if you have any questions or technical issues. I can be reached on email or at [REDACTED]

Thank you,
Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

Weekly MPA Active contract report in MSExcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

UPDATE - The OSP Bid Board is LIVE. Active Open Enrollments (formerly continuous recruitments) are posted to the Bid Board. OSP Login is LIVE at <https://www.ridop.ri.gov/osp-login/>. View all Bidding Opportunities at <https://www.ridop.ri.gov/solicitations/>. Vendor Registration remains available at <https://www.ridop.ri.gov/osp/osp-vendor-registration.php>.

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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Wednesday, April 14, 2021 10:18 AM
To: McCarthy, Thomas (RIDOH) <[REDACTED]>; Danusis, Kristen <[REDACTED]>; Mayors Office <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>; McIntyre, Nancy (DOA) <[REDACTED]>; Thorsen, Jim (DOA) <[REDACTED]>; Shaw, Jenny (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Good Morning,

The Division of Purchases received five proposals for the K-12 School and Higher Education Reopening Plan Consulting Services from the following vendors:

- Direct Safety Solutions
- Empower Schools, Inc.
- ILO Group
- MGT of America Consulting LLC
- WestEd

Nina Lennon will be distributing the proposals to the team this AM electronically. This is a high priority and there is a tight schedule for this procurement, so here is the plan:

1. We will review the technical proposals individually in accordance with the criteria set out in the RFP (attached and also see below) and then meet to discuss and score as a team.
2. My assistant Jenny Shaw will be setting up a remote meeting on TEAMS on Friday morning. I haven't seen the proposals yet, but I am estimating it will take two hours. Does 9am to 11AM work for everyone? The alternative is that we meet late Thursday afternoon or evening.
3. After we meet and discuss and score the proposals as a team, I will draft an evaluation memorandum with the consensus score and our notes. I will distribute to the team for review and comment. Once everyone is good with the technical evaluation memo, I will finalize and send to Nina in the Division of Purchases with the teams Technical evaluation.
4. At that point, Nina will distribute the cost proposals, which will most likely be scored using a formula.
5. The Technical score (70%) will be added to the Cost Score (30%) and we will send another memo to Nina with a recommendation for selection.

In terms of the technical evaluation, please read the attached RFP in detail, but here is the summary of the technical categories:

Criteria	Possible Points
Staff Qualifications	20 Points
Capability, Capacity, and Qualifications of the Vendor	20 Points
Work Plan	15 Points
Approach/Methodology	15 Points

The proposal must receive a minimum of 50 technical points out of 70 technical points in order to remain in consideration and advance to the cost evaluation phase. My suggestion would be to review the proposals and be ready to discuss at the meeting. If you want to tentatively score the proposal individually, that is okay, but when we meet, we will discuss each of our thoughts and attempt to come up with a final consensus score for each technical category as a team. If for any reason we can't agree on a proposal for a category, we can take an average, but the best case scenario is that we discuss, agree and come to a consensus score.

Please let me know if you have any questions. My cell is [REDACTED] I am looking forward to meeting all of you on Friday AM and moving through this process.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Lennon, Nina (DOA)
Sent: Tuesday, March 23, 2021 6:07 PM
To: Thorsen, Jim (DOA) <[REDACTED]>; Afonso, Antonio (GOV) <[REDACTED]>; McIntyre, Nancy (DOA) <[REDACTED]>

Cc: McCarthy, Thomas (RIDOH) <[REDACTED]>; Licht, Jeremy (DOA) <[REDACTED]>
Subject: RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Greetings All:

This is to inform you that RFP 21000563 K-12 School and Higher Education Reopening Plan Consulting Services has been posted as of 3/23.

Please find it here:

<https://webprocure.perfect.com/wp-web-public/#/bidboard/bid/87675?customerid=46> [webprocure.perfect.com]

1. The due date for vendor submission of questions is 3/31/2021 @ 1:00 PM.
2. Internal Info: Responses from the Technical Evaluation team to questions are due on 4/2/2021 @ 1:00 PM.
3. The vendor submission due date for proposals is 4/13/2021 @ 1:00 PM.

Thank you,
Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

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Weekly MPA Active contract report in MSEXcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

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Adesuyi, Doris (GOV)

From: McCabe, Brenna M (GOV)
Sent: Friday, April 16, 2021 11:52 AM
To: Ahern, Kim (GOV) <[REDACTED]>
Subject: FW: [EXTERNAL] : Questions for you

Hi,

See below – I'd like to say the following but just want to make sure it's accurate:

We are still awaiting comprehensive guidance from the federal government on what requirements will be placed on the allocation and use of the American Rescue Plan funds. This includes guidance around the allocations that will go to cities and towns, school districts, etc. Intended use of funds across state government and beyond are still subject to ongoing discussions. We will be communicating directly with school districts, cities and towns, as well as stakeholders on this subject over the course of the next few months when we expect to hear more from our federal partners.

From: McCarthy, Thomas (RIDOH) <[REDACTED]>
Sent: Thursday, April 15, 2021 10:03 AM
To: Mike Magee <[REDACTED]> McCabe, Brenna M (GOV) <[REDACTED]>
Subject: RE: [EXTERNAL] : Questions for you

Hi Mike,

Wanted to connect you with Brenna McCabe from the Governor's office who may have broader insight into where we are with some of the below.

Thanks,
Tom

From: Mike Magee <[REDACTED]>
Sent: Monday, April 12, 2021 12:25 PM
To: McCarthy, Thomas (RIDOH) <[REDACTED]>
Subject: [EXTERNAL] : Questions for you

Hi Tom,

I have a question I'm hoping you can help me with. Several of our Chiefs for Change members across the country have reached out to us with questions about how they can best access American Rescue Plan funds so we are undertaking an effort to understand how a couple of key states - including Rhode Island - intend to deploy and/or allocate their allocation. For context, the [CDC's funding allocation document \[cdc.gov\]](#) reflects that Rhode Island will receive \$31,907,434 for testing specifically.

I'm including some specific questions below and would appreciate a connection to the person with whom my team might best follow up to learn more. Thank you for your help!

Best,

Mike

Questions

1. Does the \$31,907,434 figure match your understanding of how much money Rhode Island will receive?
2. What portion of these funds has RIDOH received as of today? By when does RIDOH expect to receive the full funding amount?
3. What specific guidance has RIDOH received regarding permissible expenditures of these funds?
4. As of today, how does RIDOH intend to use these funds?
5. What options does a school system in Rhode Island have to access these funds? Can school districts use these funds to purchase systems tools to support testing, vaccination, and symptom tracking?
6. Who should a school system in Rhode Island review if they have questions about accessing these funds?

--

Michael Magee, Ph.D. CEO

 chiefsforchange.org [chiefsforchange.org] 

1455 Pennsylvania Ave., NW Suite 400-311 Washington, DC 20004

Re: [EXTERNAL] : Re: RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

From: "Thorsen, Jim (DOA)" <[REDACTED]>
To: "Majcher, Daniel (DOA)" <[REDACTED]>, "McCarthy, Thomas (RIDOH)" <[REDACTED]>, "Danusis, Kristen" <[REDACTED]>, Mayors Office <[REDACTED]>
Cc: "Lennon, Nina (DOA)" <[REDACTED]>, "McIntyre, Nancy (DOA)" <[REDACTED]>, "Shaw, Jenny (DOA)" <[REDACTED]>
Date: Sat, 17 Apr 2021 13:21:14 -0400

Dan
I want for us to interview the top two candidates for this assignment before a final recommendation is made. The work done here has never been done before and requires vision on how the work will be accomplished. It is also not a low bid situation.

From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Wednesday, April 14, 2021 10:17 AM
To: McCarthy, Thomas (RIDOH) <[REDACTED]>; Danusis, Kristen <[REDACTED]>; Mayors Office <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>; McIntyre, Nancy (DOA) <[REDACTED]>; Thorsen, Jim (DOA) <[REDACTED]>; Shaw, Jenny (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Good Morning,

The Division of Purchases received five proposals for the K-12 School and Higher Education Reopening Plan Consulting Services from the following vendors:

- Direct Safety Solutions
- Empower Schools, Inc.
- ILO Group
- MGT of America Consulting LLC
- WestEd

Nina Lennon will be distributing the proposals to the team this AM electronically. This is a high priority and there is a tight schedule for this procurement, so here is the plan:

1. We will review the technical proposals individually in accordance with the criteria set out in the RFP (attached and also see below) and then meet to discuss and score as a team.
2. My assistant Jenny Shaw will be setting up a remote meeting on TEAMS on Friday morning. I haven't seen the proposals yet, but I am estimating it will take two hours. Does 9am to 11AM work for everyone? The alternative is that we meet late Thursday afternoon or evening.
3. After we meet and discuss and score the proposals as a team, I will draft an evaluation memorandum with the consensus score and our notes. I will distribute to the team for review and comment. Once everyone is good with the technical evaluation memo, I will finalize and send to Nina in the Division of Purchases with the teams Technical evaluation.
4. At that point, Nina will distribute the cost proposals, which will most likely be scored using a formula.
5. The Technical score (70%) will be added to the Cost Score (30%) and we will send another memo to Nina with a recommendation for selection.

In terms of the technical evaluation, please read the attached RFP in detail, but here is the summary of the technical categories:

Criteria	Possible Points
Staff Qualifications	20 Points

Capability, Capacity, and Qualifications of the Vendor	20 Points
Work Plan	15 Points
Approach/Methodology	15 Points

The proposal must receive a minimum of 50 technical points out of 70 technical points in order to remain in consideration and advance to the cost evaluation phase. My suggestion would be to review the proposals and be ready to discuss at the meeting. If you want to tentatively score the proposal individually, that is okay, but when we meet, we will discuss each of our thoughts and attempt to come up with a final consensus score for each technical category as a team. If for any reason we can't agree on a proposal for a category, we can take an average, but the best case scenario is that we discuss, agree and come to a consensus score.

Please let me know if you have any questions. My cell is [REDACTED]. I am looking forward to meeting all of you on Friday AM and moving through this process.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Lennon, Nina (DOA)
Sent: Tuesday, March 23, 2021 6:07 PM
To: Thorsen, Jim (DOA) <[REDACTED]>; Afonso, Antonio (GOV) <[REDACTED]>;
McIntyre, Nancy (DOA) <[REDACTED]>
Cc: McCarthy, Thomas (RIDOH) <[REDACTED]>; Licht, Jeremy (DOA) <[REDACTED]>
Subject: RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Greetings All:

This is to inform you that RFP 21000563 K-12 School and Higher Education Reopening Plan Consulting Services has been posted as of 3/23.

Please find it here:

<https://webprocure.perfect.com/wp-web-public/#/bidboard/bid/87675?customerid=46> [webprocure.perfect.com]

1. The due date for vendor submission of questions is 3/31/2021 @ 1:00 PM.
2. Internal Info: Responses from the Technical Evaluation team to questions are due on 4/2/2021 @ 1:00 PM.
3. The vendor submission due date for proposals is 4/13/2021 @ 1:00 PM.

Thank you,
Nina



Nina M. Lennon
State of Rhode Island
Interdepartmental
Project Manager

Division of Purchases
One Capitol Hill
Providence, RI 02908-5855

Work

Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

Weekly MPA Active contract report in MSExcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

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[No Subject]

From: "McIrtyre, Nancy (DOA)" <[REDACTED]>
To: "Thorsen, Jim (DOA)" <[REDACTED]>
Date: Mon, 19 Apr 2021 17:10:05 -0400

Yes, this is what I was telling you about on Saturday. RIDE reached out to us today requesting that the RFP on the street be extended until the end of the month. It is my understanding that RIC is submitting a proposal along with some other potential providers. I also believe that the General Assembly plans on funding this program going forward but unsure if that will take place for the next fiscal year. Feel free to call me should you require any further information.

From: [Thorsen, Jim \(DOA\)](#)
To: [Afonso, Antonio \(GOV\)](#)
Subject: Fwd: Interviews for RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services
Date: Monday, April 19, 2021 6:24:14 PM

Fyi
Jet
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From: Thorsen, Jim (DOA) <[REDACTED]>
Sent: Monday, April 19, 2021 9:37 AM
To: Majcher, Daniel (DOA); Lennon, Nina (DOA)
Cc: McIntyre, Nancy (DOA); Mayors Office; Danusis, Kristen; McCarthy, Thomas (RIDOH); Shaw, Jenny (DOA)
Subject: RE: Interviews for RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Dan

I really think that my biggest question and the added value of this part of the procurement exercise is to get a sense, or some evidence of, the compatibility of the proposing firm with the Governor's objectives, such as they know them. This is huge, because the successful proposer must have a shared vision and be able to communicate and work effectively with the Governor's team over time.

Thx
jet

James E. Thorsen

Acting Director of Administration
State of Rhode Island

[REDACTED] (o)
[REDACTED] (c)

From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Monday, April 19, 2021 9:18 AM
To: Lennon, Nina (DOA) <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> Thorsen, Jim (DOA) <[REDACTED]> Mayors Office <[REDACTED]> Danusis, Kristen <[REDACTED]> McCarthy, Thomas (RIDOH) <[REDACTED]> Shaw, Jenny (DOA) <[REDACTED]>
Subject: Re: Interviews for RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Hi Nina,

I am out of the office today, but maybe something like this:

Agenda

Presentation of proposal - 30-40 minutes

(Suggested)

10 minutes - Staff Qualifications

10 minutes - Capacity,

10 minutes - Work Plan

5 minutes - Approach/Methodology

Questions 20-30 minutes

Total time is approximately an hour.

From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Monday, April 19, 2021 9:05 AM
To: Majcher, Daniel (DOA) <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> Thorsen, Jim (DOA) <[REDACTED]> Mayors Office <[REDACTED]> Danusis, Kristen <[REDACTED]> McCarthy, Thomas (RIDOH) <[REDACTED]> Shaw, Jenny (DOA) <[REDACTED]>
Subject: RE: Interviews for RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Good Morning Dan,

Yes, this makes sense and I will reach out to the vendors to schedule these sessions. Could you create an agenda for the vendors to give them direction on what they should cover on their technical proposal and the time allocated?

Thank you,
Nina



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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Saturday, April 17, 2021 4:54 PM
To: Lennon, Nina (DOA) <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> Thorsen, Jim (DOA) <[REDACTED]> Mayors Office <[REDACTED]> Danusis, Kristen <[REDACTED]> McCarthy, Thomas (RIDOH) <[REDACTED]> Shaw, Jenny (DOA) <[REDACTED]>
Subject: Interviews for RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Hi Nina,

As you are aware, the Review Team met yesterday to discuss the proposals submitted in response to the above mentioned procurement. We tentatively found three of the vendors (MGT Consulting, ILO Group, and WestEd) who submitted proposals to be responsive to the RFP and above the 50 point threshold based on the written proposals. The Review Team determined that two of the proposals (Empower Schools and Education Safety Solutions) were non-responsive and/or did not meet the necessary threshold to advance to the cost phase. Empower Schools did not include resumes or reference information and scored a 9 out of 70. Education Safety Solutions only addressed one element of the RFP, restated work that was already performed by the State in its workplan and scored a 16 out of 70.

Because this is such an important procurement for the State of Rhode Island and in the interests of completing our due diligence, I am requesting that the Review Team interview the three responsive vendors (MGT Consulting, ILO Group and WestEd) in order to finalize the technical scores. This is not unprecedented and in many past procurements that I have handled, we conducted interviews with the finalists. I have spoken to Nancy McIntyre and Director Thorsen and both agree that an interview makes sense in this case. They understand this will slightly delay the evaluation timeline, but feel this would be an important step in this procurement.

In terms of scheduling, I have emailed the other review team members and tentatively proposed Friday, April 23rd. As you know, Kristen is out of the office for a few days next week for the school break and I also want to give vendors a little time to get their teams together and prepare. The interviews would be remote and I am thinking about an hour each, with some buffer time in

between (maybe 15 minutes). We would ask them to present their proposals and answer questions from the team as necessary. After the interviews, the team would meet to finalize the technical scores and will submit the technical evaluation memo at that time. Does this process make sense? Also, do you want to reach out these vendors to schedule interviews? Alternatively, I am happy to have my assistant Jenny Shaw set this up with the vendors once we hear back from the team on their availability.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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Re: [EXTERNAL] : Robert and Nancy sent 2 messages to your chat

From: "Thorsen, Jim (DOA)" <[REDACTED]>
To: You have new messages in Teams <[REDACTED]>
Date: Mon, 19 Apr 2021 18:29:21 -0400

Let's talk in the am please.

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From: You have new messages in Teams <[REDACTED]>
Sent: Monday, April 19, 2021 6:07:47 PM
To: Thorsen, Jim (DOA) <[REDACTED]>
Subject: [EXTERNAL] : Robert and Nancy sent 2 messages to your chat

Hi,

Your teammates are trying to reach you in [Microsoft Teams \[teams.microsoft.com\]](#).

RD Robert sent a message in chat with Robert + 4 [\[teams.microsoft.com\]](#)

here we go

NM Nancy sent a message in chat [\[teams.microsoft.com\]](#)

Yes, this is what I was telling you about on Saturday. RIDE reached out to us today requesting that the RFP on...

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From: [Lennon, Nina \(DOA\)](#)
To: [McCarthy, Thomas \(RIDOH\)](#); [Mavors Office](#); [Danusis, Kristen](#); [Maicher, Daniel \(DOA\)](#)
Cc: [Shaw, Jenny \(DOA\)](#)
Subject: Interview WestEd: RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services
Attachments: [WestEd RI RFP Interview_rev04-23-21_FINAL.pdf](#)

Division of Purchases is inviting you to a scheduled Zoom meeting.

Topic: RFP 21000563 - K-12 School and Higher Education Reopening Plan Consulting Services

Time: Apr 26, 2021 09:00 AM Eastern Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/87801172146?pwd=bGticW4ydDZtQU0yaHNpaGdVdFlhdz09>

Meeting ID: 878 0117 2146

Passcode: 493184

One tap mobile

+13017158592,,87801172146#,,,,*493184# US (Washington DC)

+13126266799,,87801172146#,,,,*493184# US (Chicago)

Dial by your location

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

+1 646 558 8656 US (New York)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 669 900 9128 US (San Jose)

877 853 5247 US Toll-free

888 788 0099 US Toll-free

833 548 0276 US Toll-free

833 548 0282 US Toll-free

Meeting ID: 878 0117 2146

Passcode: 493184

Find your local number: <https://us02web.zoom.us/j/kGq7cqgZU> <<https://us02web.zoom.us/j/kGq7cqgZU>>

- * Dana Chambers, WestEd: [REDACTED] <[mailto:\[REDACTED\]](mailto:[REDACTED])>
- * Jason Willis, WestEd: [REDACTED] <[mailto:\[REDACTED\]](mailto:[REDACTED])>
- * Natalie Walrond, WestEd: [REDACTED] <[mailto:\[REDACTED\]](mailto:[REDACTED])>
- * Dr. Lynn Silver, PHI: [REDACTED] <[mailto:\[REDACTED\]](mailto:[REDACTED])>
- * Betsy Starr, NIOST: [REDACTED] <[mailto:\[REDACTED\]](mailto:[REDACTED])>

From: [Majcher, Daniel \(DOA\)](#)
To: [Danusis, Kristen](#); [McCarthy, Thomas \(RIDOH\)](#); [Lopes Metcalfe, Christine \(GOV\)](#); [Riley, Ana](#)
Cc: [Mayors Office](#); [Lennon, Nina \(DOA\)](#)
Subject: RE: [EXTERNAL] : Re: Education RFP
Date: Friday, April 30, 2021 12:01:00 PM
Attachments: [Level of Effort -- Best and Final Pricing DRAFT 4-30-2021.xlsx](#)
[image001.jpg](#)
[image002.jpg](#)

For your thoughts and ultimately the completion of our estimated hours (it can be a range), see attached spreadsheet (with 2 tabs on the bottom).

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Majcher, Daniel (DOA)
Sent: Friday, April 30, 2021 10:53 AM
To: Danusis, Kristen <[REDACTED]> McCarthy, Thomas (RIDOH)
<[REDACTED]> Lopes Metcalfe, Christine (GOV)
<[REDACTED]> Riley, Ana <[REDACTED]>
Cc: Mayors Office <[REDACTED]> Lennon, Nina (DOA)
<[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Good Morning,

I appreciate your assistance with trying to better define the level of effort necessary for these consulting services. The RFP provides the following components:

i. COVID testing planning, organization and communication as a part of statewide full in-

person public school reopening including, but not limited to, underserved students;

ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;

iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;

iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;

v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;

vi. equity review and initiatives;

vii. development of metrics and accountability of outcomes relevant to program implementation and organization;

viii. higher education needs assessment relative to in person reopening of state colleges and universities, and

ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.

I am thinking the best approach may be to provide a range of estimated hours that we anticipate for each of these items, but I will defer to you whether there is a different way to organize this.

The Division of Purchases is anxious about the procurement timeline, so if you can give me an idea when you will have something, that would be great! I am hoping by the end of the day or by Monday AM, but let me know.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
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One Capitol Hill, 4th Fl.
Providence, RI 02908

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From: Danusis, Kristen <[REDACTED]>
Sent: Thursday, April 29, 2021 3:06 PM
To: McCarthy, Thomas (RIDOH) <[REDACTED]> Majcher, Daniel (DOA) <[REDACTED]> Mayors Office <[REDACTED]> Lopes Metcalfe, Christine (GOV) <[REDACTED]>
Cc: Riley, Ana <[REDACTED]>
Subject: [EXTERNAL] : Re: Education RFP

I will happily work with Christine again Adding Ana Riley here as she would like to have input as well.

From: "McCarthy, Thomas (RIDOH)" <[REDACTED]>
Date: Thursday, April 29, 2021 at 3:03 PM
To: "Majcher, Daniel (DOA)" <[REDACTED]> Mayors Office <[REDACTED]> "Danusis, Kristen" <[REDACTED]> "Lopes Metcalfe, Christine (GOV)" <[REDACTED]>
Subject: Education RFP

Good afternoon team,

I wanted to introduce you to Christine Lopes-Metcalfe, the senior education advisor in the Governor's Office.

Christine,

This group is working to complete the evaluation for an RFP tied to delivering on the Governor's education and supporting municipalities in fully reopening schools next year, building upon the outcomes of the LEAP task force, and working to establish municipal education departments. I spoke with Tony Afonso and he asked that we work with you to develop a rough sizing of what we think the engagement would require to deliver on the Governor's intent. Kristen Danusis and RIDE have taken a first pass at the sizing but we want to make sure we're fully aligned with the Governor's expectations. Can you please work with Kristen to help flesh out what we would assess the minimum level of effort would be so that we can ask the vendors to bid accordingly?

Thank you,
Tom

Tom McCarthy
Executive Director, COVID Response
Rhode Island Department of Health
100 Sockanosset Crossroads
Cranston, RI 02920

(c) [REDACTED]
[REDACTED]

Maggie Torres
Executive Assistant to the Executive Director

[REDACTED]



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From: [Majcher, Daniel \(DOA\)](#)
To: [McIntyre, Nancy \(DOA\)](#)
Subject: FW: [EXTERNAL] : Re: Education RFP
Date: Friday, April 30, 2021 12:02:00 PM
Attachments: [Level of Effort -- Best and Final Pricing DRAFT 4-30-2021.xlsx](#)
[image001.jpg](#)
[image002.jpg](#)

FYI

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Majcher, Daniel (DOA)
Sent: Friday, April 30, 2021 12:02 PM
To: Danusis, Kristen <[REDACTED]>; McCarthy, Thomas (RIDOH) <[REDACTED]>; Lopes Metcalfe, Christine (GOV) <[REDACTED]>; Riley, Ana <A[REDACTED]>
Cc: Mayors Office <[REDACTED]>; Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

For your thoughts and ultimately the completion of our estimated hours (it can be a range), see attached spreadsheet (with 2 tabs on the bottom).

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
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One Capitol Hill, 4th Fl.
Providence, RI 02908

Tel: [REDACTED]
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Sent: Friday, April 30, 2021 10:53 AM
To: Danusis, Kristen [REDACTED] >; McCarthy, Thomas (RIDOH) <[REDACTED]>; Lopes Metcalfe, Christine (GOV) <[REDACTED]>; Riley, Ana <[REDACTED]>
Cc: Mayors Office <[REDACTED]> Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

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- i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;*
- ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;*
- iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;*
- iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;*
- v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;*

vi. equity review and initiatives;

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I am thinking the best approach may be to provide a range of estimated hours that we anticipate for each of these items, but I will defer to you whether there is a different way to organize this.

The Division of Purchases is anxious about the procurement timeline, so if you can give me an idea when you will have something, that would be great! I am hoping by the end of the day or by Monday AM, but let me know.

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Sent: Thursday, April 29, 2021 3:06 PM
To: McCarthy, Thomas (RIDOH) <[REDACTED]>; Majcher, Daniel (DOA) <[REDACTED]>; Mayors Office <[REDACTED]>; Lopes Metcalfe, Christine (GOV) <[REDACTED]>
Cc: Riley, Ana <[REDACTED]>

Subject: [EXTERNAL] : Re: Education RFP

I will happily work with Christine again Adding Ana Riley here as she would like to have input as well.

From: "McCarthy, Thomas (RIDOH)" <[REDACTED]>
Date: Thursday, April 29, 2021 at 3:03 PM
To: "Majcher, Daniel (DOA)" <[REDACTED]>, Mayors Office
[REDACTED] >, "Danusis, Kristen" <[REDACTED]>,
"Lopes Metcalfe, Christine (GOV)" <[REDACTED]>
Subject: Education RFP

Good afternoon team,

I wanted to introduce you to Christine Lopes-Metcalf, the senior education advisor in the Governor's Office.

Christine,

This group is working to complete the evaluation for an RFP tied to delivering on the Governor's education and supporting municipalities in fully reopening schools next year, building upon the outcomes of the LEAP task force, and working to establish municipal education departments. I spoke with Tony Afonso and he asked that we work with you to develop a rough sizing of what we think the engagement would require to deliver on the Governor's intent. Kristen Danusis and RIDE have taken a first pass at the sizing but we want to make sure we're fully aligned with the Governor's expectations. Can you please work with Kristen to help flesh out what we would assess the minimum level of effort would be so that we can ask the vendors to bid accordingly?

Thank you,
Tom

Tom McCarthy
Executive Director, COVID Response
Rhode Island Department of Health
100 Sockanosset Crossroads
Cranston, RI 02920
(c) [REDACTED]
[REDACTED]

Maggie Torres
Executive Assistant to the Executive Director
[REDACTED]



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Instructions: Please review the "Estimated Level of Effort" column on the next tab. Please then complete table on the next tab with your best and final proposed rates, level of effort, and best and final fully loaded blended (all inclusive rates). Last, please confirm and/or explain the following:

1. The proposed team provided in your proposal can deliver the level of effort stated in the next tab (yes or no).

2. If not, please specify whether you wish to withdraw from consideration or how you will otherwise meet the requirements of the RFP.

3. Please confirm that the proposed work plan, approach and methodology will does not change based on the anticipated level of effort provided in the following tab.

	(Provided by State)	Provided by Vendor:			
<i>Estimated Level of Effort By Component</i>	<i>State's Estimated Level of Effort (hours)</i>	<i>Vendor's Itemized Rates (Title and \$)</i>	<i>Vendor's Proposed Level of Effort (Hours)</i>	<i>Vendor's fully loaded Blended Rate (\$)</i>	<i>Cost (Level of Effort x Fully Loaded Blended Rate)</i>
i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;					\$0
ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;					\$0
iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;					\$0
iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;					\$0
v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;					\$0
vi. equity review and initiatives;					\$0
vii. development of metrics and accountability of outcomes relevant to program implementation and organization;					\$0
viii. higher education needs assessment relative to in person reopening of state colleges and universities, and					\$0
ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.					\$0
		Total Hours:	0	Total Cost:	\$0

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ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.					\$0
		Total Hours:	0	Total Cost:	\$0

From: [Danusis, Kristen](#)
To: [Majcher, Daniel \(DOA\)](#)
Subject: Re: [EXTERNAL] : Re: Education RFP
Date: Monday, May 3, 2021 2:58:58 PM
Attachments: [image001.jpg](#)
[image002.jpg](#)
[image003.jpg](#)

A team from RIDE, RIDOH, and EdOC met this AM with Christine Lopes-Metcalf. We decided to create a document that added they type of support that was needed (technical assistance and/or directly staffed on the ground support) for each of the tasks within the RFP. I started the draft and sent it out to the team. Christine agreed to finalize it by EOD. My understanding was that she would send it out to ILO Group & WestEd to see if they wanted to submit a supplemental proposal based on the more specific scope of work. Call me if you have any questions: [REDACTED].

From: "Majcher, Daniel (DOA)" <[REDACTED]>
Date: Monday, May 3, 2021 at 1:36 PM
To: "Danusis, Kristen" <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Just checking in on this. How is it going?

Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
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From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:18 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Danusis, Kristen

<[REDACTED]>

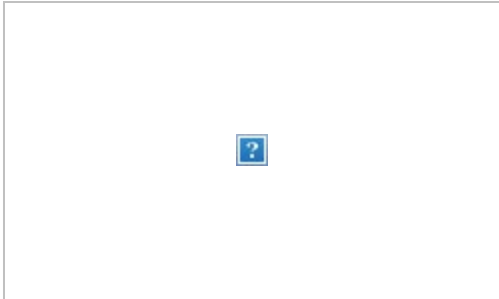
Subject: RE: [EXTERNAL] : Re: Education RFP

Thank you, Dan.

Anyone that is brought into discussions with this RFP needs to be vetted and sign a COI form – they can be an advisor if there is no conflict.

<https://www.ridop.ri.gov/StateAgencyInfoCenter/DocsForms/conflict-of-interest-form.docx>

Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

Weekly MPA Active contract report in MSEXcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

UPDATE - The OSP Bid Board is LIVE. Active Open Enrollments (formerly continuous recruitments) are posted to the Bid Board. OSP Login is LIVE at <https://www.ridop.ri.gov/osp-login/>. View all Bidding Opportunities at <https://www.ridop.ri.gov/solicitations/>. Vendor Registration remains available at <https://www.ridop.ri.gov/osp/osp-vendor-registration.php>.

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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:07 PM
To: Danusis, Kristen <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Ana is an employee of RIDE and she understands that the proposals are confidential at present? I think that makes sense and would be okay with it, but I am looping in Nina from Purchases to make sure that is not an issue from her perspective.

Thanks,

Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
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Tel: [REDACTED]
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From: Danusis, Kristen <[REDACTED]>
Sent: Friday, April 30, 2021 12:00 PM
To: Majcher, Daniel (DOA) <[REDACTED]>
Subject: Re: [EXTERNAL] : Re: Education RFP

Am I able to share the two final proposals with Ana Riley at RIDE so she has an understanding of the differences and scope and hours as we make our recommendations?

From: "Majcher, Daniel (DOA)" <[REDACTED]>
Date: Friday, April 30, 2021 at 10:53 AM
To: "Danusis, Kristen" <[REDACTED]> "McCarthy, Thomas (RIDOH)" <[REDACTED]> "Lopes Metcalfe, Christine (GOV)" <[REDACTED]> "Riley, Ana" <[REDACTED]>
Cc: Mayors Office <[REDACTED]> Nina Lennon <[REDACTED]>
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Cc: Riley, Ana <[REDACTED]>
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Date: Thursday, April 29, 2021 at 3:03 PM
To: "Majcher, Daniel (DOA)" <[REDACTED]> Mayors Office <[REDACTED]> "Danusis, Kristen" <[REDACTED]> "Lopes Metcalfe, Christine (GOV)" <[REDACTED]>
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(c) [REDACTED]
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Maggie Torres
Executive Assistant to the Executive Director
[REDACTED]



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From: [Lopes Metcalfe, Christine \(GOV\)](#)
To: [Majcher, Daniel \(DOA\)](#); [Danusis, Kristen](#)
Cc: [Lennon, Nina \(DOA\)](#)
Subject: RE: [EXTERNAL] : Re: Education RFP
Date: Monday, May 3, 2021 3:30:15 PM
Attachments: [image001.jpg](#)
[image002.jpg](#)
[image003.jpg](#)
[Reopening Schools RFP Scope of Work.DRAFT_CLM.docx](#)

Hello All,

Based on the conversation this morning, we identified the level of supports needed in an effort to provide more clarity on expectations for the engagement. I've updated the draft Kristen prepared and if purchasing has any tools to help quantify the support into hours that would be helpful – and as mentioned below all communications should continue through purchasing with any vendors.

Please let me know if I can provide any additional information to assist with understanding the scopes.

Best
Christine

Christine Lopes Metcalfe

Senior Advisor on Education
Office of the Governor Daniel J. McKee
State House
Providence, RI 02903
[REDACTED]

From: Majcher, Daniel (DOA) <[REDACTED]>
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To: Danusis, Kristen <[REDACTED]>
Cc: Lopes Metcalfe, Christine (GOV) <[REDACTED]> Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

That is generally fine, but I would like to review the document before it is sent to the vendors. Also, because we are in the middle of a procurement, communicating with the vendors should be handled formally by Nina Lennon in the Division of Purchases. Therefore, please send me the document once it is in final form.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration

Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Danusis, Kristen <[REDACTED]>
Sent: Monday, May 3, 2021 2:59 PM
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Subject: Re: [EXTERNAL] : Re: Education RFP

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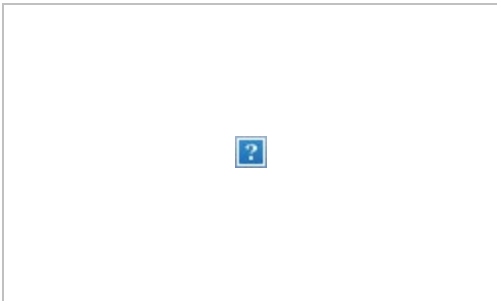
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<https://www.ridop.ri.gov/StateAgencyInfoCenter/DocsForms/conflict-of-interest-form.docx>

Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

Weekly MPA Active contract report in MSExcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

UPDATE - The OSP Bid Board is LIVE. Active Open Enrollments (formerly continuous recruitments) are posted to the Bid Board. OSP Login is LIVE at <https://www.ridop.ri.gov/osp-login/>. View all Bidding Opportunities at <https://www.ridop.ri.gov/solicitations/>. Vendor Registration remains available at <https://www.ridop.ri.gov/osp/osp-vendor-registration.php>.

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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:07 PM
To: Danusis, Kristen <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Ana is an employee of RIDE and she understands that the proposals are confidential at present? I think that makes sense and would be okay with it, but I am looping in Nina from Purchases to make sure that is not an issue from her perspective.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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Subject: Re: [EXTERNAL] : Re: Education RFP

Am I able to share the two final proposals with Ana Riley at RIDE so she has an understanding of the differences and scope and hours as we make our recommendations?

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Date: Friday, April 30, 2021 at 10:53 AM
To: "Danusis, Kristen" <[REDACTED]> "McCarthy, Thomas (RIDOH)"

< [REDACTED] "Lopes Metcalfe, Christine (GOV)"

< [REDACTED] "Riley, Ana" < [REDACTED]

Cc: Mayors Office < [REDACTED] Nina Lennon

< [REDACTED]

Subject: RE: [EXTERNAL] : Re: Education RFP

Good Morning,

I appreciate your assistance with trying to better define the level of effort necessary for these consulting services. The RFP provides the following components:

- i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;*
- ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;*
- iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;*
- iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;*
- v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;*
- vi. equity review and initiatives;*
- vii. development of metrics and accountability of outcomes relevant to program implementation and organization;*
- viii. higher education needs assessment relative to in person reopening of state colleges and universities, and*
- ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.*

I am thinking the best approach may be to provide a range of estimated hours that we anticipate for each of these items, but I will defer to you whether there is a different way to organize this.

The Division of Purchases is anxious about the procurement timeline, so if you can give me an idea when you will have something, that would be great! I am hoping by the end of the day or by Monday AM, but let me know.

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Cc: Riley, Ana <[REDACTED]>
Subject: [EXTERNAL] : Re: Education RFP

I will happily work with Christine again Adding Ana Riley here as she would like to have input as well.

From: "McCarthy, Thomas (RIDOH)" <[REDACTED]>
Date: Thursday, April 29, 2021 at 3:03 PM
To: "Majcher, Daniel (DOA)" <[REDACTED]> Mayors Office <[REDACTED]> "Danusis, Kristen" <[REDACTED]> "Lopes Metcalfe, Christine (GOV)" <[REDACTED]>
Subject: Education RFP

Good afternoon team,

I wanted to introduce you to Christine Lopes-Metcalfe, the senior education advisor in the Governor's

Office.

Christine,

This group is working to complete the evaluation for an RFP tied to delivering on the Governor's education and supporting municipalities in fully reopening schools next year, building upon the outcomes of the LEAP task force, and working to establish municipal education departments. I spoke with Tony Afonso and he asked that we work with you to develop a rough sizing of what we think the engagement would require to deliver on the Governor's intent. Kristen Danusis and RIDE have taken a first pass at the sizing but we want to make sure we're fully aligned with the Governor's expectations. Can you please work with Kristen to help flesh out what we would assess the minimum level of effort would be so that we can ask the vendors to bid accordingly?

Thank you,
Tom

Tom McCarthy
Executive Director, COVID Response
Rhode Island Department of Health
100 Sockanosset Crossroads
Cranston, RI 02920
(c) [REDACTED]

Maggie Torres
Executive Assistant to the Executive Director
[REDACTED]



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Reopening Schools RFP: Scope of Work

Type of Work	Technical Assistance	Requires dedicated staffing to implement <u>project work</u> on the ground <u>during the duration of the engagement</u>	Connection to other state agencies
Conduct analysis of existing PK-12 and IHE COVID-19 specific initiatives and needs statewide (focus on equity) and share results and recommendations. Use information to inform project planning.		X	RIDOH, DCYF, DHS, RIDE, and Governor's Office
COVID-19 testing: <ul style="list-style-type: none"> Support creation and implementation of testing options for SY21 Develop metrics to track progress and accountability for outcomes Provide direct support to schools as questions/issues arise Communications 	X X X	X X	RIDOH testing team
Vaccination Efforts <ul style="list-style-type: none"> Assisting in the coordination of the vaccination of PK-12 and IHE individuals (planning, messaging) Develop metrics to track progress and accountability for outcomes 	X X		RIDOH vaccine team
Serve as intermediary between <u>LEAs/schools</u> <u>public and private schools</u> and state agencies <ul style="list-style-type: none"> Manage structure for maintaing two way communication between LEAs/schools and state agencies regarding their successes, needs and solutions to maintain safe in-person learning 		X X	RIDOH, DCYF, DHS, RIDE, and Governor's Office

Commented [DK1]: Should we specifically call out private schools? Not sure if this group will continue to be supported but EdOC has provided a LOT of support to them this year.

<ul style="list-style-type: none"> • Collaborating with state agencies to problem solve around school challenges • Align efforts involving PK-12 and higher education across the state agencies • Create structure that allows LEAs/schools <u>public and private schools</u> to learn with and from one another based upon local decisions and national research/best practices 		X	
Develop and implement solutions to address learning loss with accelerated learning programs	<u>X</u>	<u>X</u>	RIDE
Support programs to address PK-12 mental health needs	<u>X</u>		
Create process and supports for LEAs-public and private schools to manage expenditure and prioritization of American Rescue Plan and other federal funding sources <u>for long-term impact</u>	<u>X</u>	<u>X</u>	
Create process and supports for <u>39 municipalities to implement local learning offices committed to supporting out-of-school learning opportunities for all children in the community-community-based programs outside of school hours that support PK-12 students and families</u>		<u>X</u>	<u>Municipal Affairs Office</u>

From: [Lopes Metcalfe, Christine \(GOV\)](#)
To: [Majcher, Daniel \(DOA\)](#); [McCarthy, Thomas \(RIDOH\)](#); [Danusis, Kristen](#); [Mayors Office](#)
Cc: [McIntyre, Nancy \(DOA\)](#); [Lennon, Nina \(DOA\)](#)
Subject: RE: [EXTERNAL] : Re: Education RFP
Date: Tuesday, May 4, 2021 5:50:42 PM
Attachments: [image001.jpg](#)
[image002.jpg](#)
[image003.jpg](#)
[image004.jpg](#)
[Copy of Level of Effort -- Best and Final Pricing DRAFT 5-4-2021_cim.xlsx](#)

Daniel,

Attached are my thoughts on estimated effort by component and welcome feedback or any questions.

-Christine

Christine Lopes Metcalfe

Senior Advisor on Education
Office of the Governor Daniel J. McKee
State House
Providence, RI 02903

[REDACTED]

From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Tuesday, May 4, 2021 4:08 PM
To: Lopes Metcalfe, Christine (GOV) <[REDACTED]> McCarthy, Thomas (RIDOH) <[REDACTED]> Danusis, Kristen <[REDACTED]> Mayors Office <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Christine,

We need to get this wrapped up. My understanding is that the expectation from the Governor is that this will not be less than 22,000 hours for this project. I have added columns (B and C) with suggested hours for each item in the RFP. I did my best with my limited experience to provide some estimates in each of the categories.

Please review and comment by the end of the day on whether any of the hours should be adjusted for columns B and C. Tomorrow morning we will send to the finalist vendors for their submission.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.

Providence, RI 02908

Tel: [REDACTED]

Fax: [REDACTED]

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From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Tuesday, May 4, 2021 3:17 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Lopes Metcalfe, Christine (GOV) <[REDACTED]> Danusis, Kristen <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> McCarthy, Thomas (RIDOH) <[REDACTED]> Riley, Ana <[REDACTED]> Hinck, Kurt (RIDOH-Contractor) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

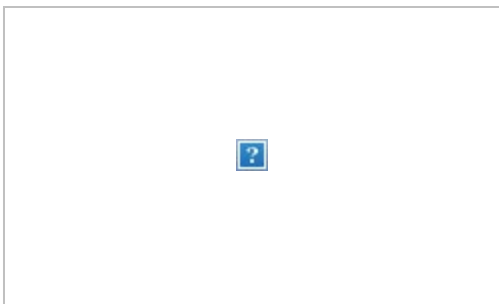
Greetings Team,

I just reviewed the document titled 'Reopening Schools RFP: Scope of Work' and want to be clear that the State is not in the position to change the scope of work in the RFP that is posted. The options are to instruct the vendors to submit a final budget with specific instructions or to cancel the bid to continue to vet the scope as a team.

Please let me know how you would like to proceed.

Kurt: Please submit a COI letter ASAP.

Thank you,
Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

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Sent: Monday, May 3, 2021 3:53 PM
To: Lopes Metcalfe, Christine (GOV) <[REDACTED]> Danusis, Kristen <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Christine,

Thank you for sending. I agree, we need to provide some guidance to the three final vendors in terms of hours. Would it be possible to add column and have a range or maybe a maximum amount of hours stated into the table you sent? Is there a budget for this project and maybe you can work backwards from there to figure out a range of hours?

Also, attached is a spreadsheet I put together using the requirements already stated in the RFP. This is what we were looking to send out to the vendors, with some guidance on column B (again, this could be a range of hours or a maximum amount, if that is easier to figure out). If you want to substitute this with the table you created, that is fine, but again, we would need to add a column with hours. We would also need to add a column for the vendors to resubmit their pricing based on a somewhat equalized level of effort.

Thanks,
Dan

Daniel W. Majcher, Esq.
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Sent: Monday, May 3, 2021 3:30 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Danusis, Kristen
<[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Hello All,

Based on the conversation this morning, we identified the level of supports needed in an effort to provide more clarity on expectations for the engagement. I've updated the draft Kristen prepared and if purchasing has any tools to help quantify the support into hours that would be helpful – and as mentioned below all communications should continue through purchasing with any vendors.

Please let me know if I can provide any additional information to assist with understanding the scopes.

Best
Christine

Christine Lopes Metcalfe
Senior Advisor on Education
Office of the Governor Daniel J. McKee
State House
Providence, RI 02903
[REDACTED]

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Sent: Monday, May 3, 2021 3:07 PM
To: Danusis, Kristen <[REDACTED]>
Cc: Lopes Metcalfe, Christine (GOV) <[REDACTED]> Lennon, Nina
(DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

That is generally fine, but I would like to review the document before it is sent to the vendors. Also, because we are in the middle of a procurement, communicating with the vendors should be handled formally by Nina Lennon in the Division of Purchases. Therefore, please send me the document once it is in final form.

Thanks,
Dan

Daniel W. Majcher, Esq.
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Sent: Monday, May 3, 2021 2:59 PM
To: Majcher, Daniel (DOA) <[REDACTED]>
Subject: Re: [EXTERNAL] : Re: Education RFP

A team from RIDE, RIDOH, and EdOC met this AM with Christine Lopes-Metcalf. We decided to create a document that added the type of support that was needed (technical assistance and/or directly staffed on the ground support) for each of the tasks within the RFP. I started the draft and sent it out to the team. Christine agreed to finalize it by EOD. My understanding was that she would send it out to ILO Group & WestEd to see if they wanted to submit a supplemental proposal based on the more specific scope of work. Call me if you have any questions: [REDACTED].

From: "Majcher, Daniel (DOA)" <[REDACTED]>
Date: Monday, May 3, 2021 at 1:36 PM
To: "Danusis, Kristen" <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Just checking in on this. How is it going?

Dan

Daniel W. Majcher, Esq.

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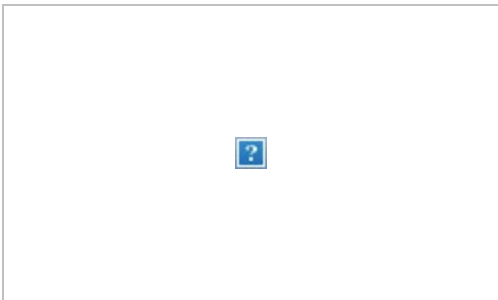
From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:18 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Danusis, Kristen
<[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Thank you, Dan.

Anyone that is brought into discussions with this RFP needs to be vetted and sign a COI form – they can be an advisor if there is no conflict.

<https://www.ridop.ri.gov/StateAgencyInfoCenter/DocsForms/conflict-of-interest-form.docx>

Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

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Cc: Mayors Office <[REDACTED]> Nina Lennon <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

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- v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;*
- vi. equity review and initiatives;*
- vii. development of metrics and accountability of outcomes relevant to program implementation and organization;*
- viii. higher education needs assessment relative to in person reopening of state colleges and universities, and*
- ix. act as lead project manager for setting up pool testing for public schools, K through 12,*

Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.

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The Division of Purchases is anxious about the procurement timeline, so if you can give me an idea when you will have something, that would be great! I am hoping by the end of the day or by Monday AM, but let me know.

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Dan

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Subject: [EXTERNAL] : Re: Education RFP

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To: "Majcher, Daniel (DOA)" <[REDACTED]> Mayors Office <[REDACTED]> "Danusis, Kristen" <[REDACTED]>

"Lopes Metcalfe, Christine (GOV)" <[REDACTED]>

Subject: Education RFP

Good afternoon team,

I wanted to introduce you to Christine Lopes-Metcalf, the senior education advisor in the Governor's Office.

Christine,

This group is working to complete the evaluation for an RFP tied to delivering on the Governor's education and supporting municipalities in fully reopening schools next year, building upon the outcomes of the LEAP task force, and working to establish municipal education departments. I spoke with Tony Afonso and he asked that we work with you to develop a rough sizing of what we think the engagement would require to deliver on the Governor's intent. Kristen Danusis and RIDE have taken a first pass at the sizing but we want to make sure we're fully aligned with the Governor's expectations. Can you please work with Kristen to help flesh out what we would assess the minimum level of effort would be so that we can ask the vendors to bid accordingly?

Thank you,
Tom

Tom McCarthy
Executive Director, COVID Response
Rhode Island Department of Health
100 Sockanosset Crossroads
Cranston, RI 02920
(c) [REDACTED]

Maggie Torres
Executive Assistant to the Executive Director



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From: [Majcher, Daniel \(DOA\)](#)
To: [Lopes Metcalfe, Christine \(GOV\)](#); [McCarthy, Thomas \(RIDOH\)](#); [Danusis, Kristen](#); [Mayors Office](#)
Cc: [McIntyre, Nancy \(DOA\)](#); [Lennon, Nina \(DOA\)](#)
Subject: RE: [EXTERNAL] : Re: Education RFP
Date: Tuesday, May 4, 2021 4:08:00 PM
Attachments: [image001.jpg](#)
[image002.jpg](#)
[image003.jpg](#)
[image004.jpg](#)
[Level of Effort -- Best and Final Pricing DRAFT 5-4-2021.xlsx](#)

Christine,

We need to get this wrapped up. My understanding is that the expectation from the Governor is that this will not be less than 22,000 hours for this project. I have added columns (B and C) with suggested hours for each item in the RFP. I did my best with my limited experience to provide some estimates in each of the categories.

Please review and comment by the end of the day on whether any of the hours should be adjusted for columns B and C. Tomorrow morning we will send to the finalist vendors for their submission.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Tuesday, May 4, 2021 3:17 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Lopes Metcalfe, Christine (GOV) <[REDACTED]> Danusis, Kristen <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> McCarthy, Thomas (RIDOH) <[REDACTED]> Riley, Ana <[REDACTED]> Hinck, Kurt (RIDOH-Contractor) <[REDACTED]>

Subject: RE: [EXTERNAL] : Re: Education RFP

Greetings Team,

I just reviewed the document titled 'Reopening Schools RFP: Scope of Work' and want to be clear that the State is not in the position to change the scope of work in the RFP that is posted. The options are to instruct the vendors to submit a final budget with specific instructions or to cancel the bid to continue to vet the scope as a team.

Please let me know how you would like to proceed.

Kurt: Please submit a COI letter ASAP.

Thank you,
Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

Weekly MPA Active contract report in MSEXcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

UPDATE - The OSP Bid Board is LIVE. Active Open Enrollments (formerly continuous recruitments) are posted to the Bid Board. OSP Login is LIVE at <https://www.ridop.ri.gov/osp-login/>. View all Bidding Opportunities at <https://www.ridop.ri.gov/solicitations/>. Vendor Registration remains available at <https://www.ridop.ri.gov/osp/osp-vendor-registration.php>.

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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Monday, May 3, 2021 3:53 PM
To: Lopes Metcalfe, Christine (GOV) <[REDACTED]> Danusis, Kristen <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Christine,

Thank you for sending. I agree, we need to provide some guidance to the three final vendors in terms of hours. Would it be possible to add column and have a range or maybe a maximum amount

of hours stated into the table you sent? Is there a budget for this project and maybe you can work backwards from there to figure out a range of hours?

Also, attached is a spreadsheet I put together using the requirements already stated in the RFP. This is what were looking to send out to the vendors, with some guidance on column B (again, this could be a range of hours or a maximum amount, if that is easier to figure out). If you want to substitute this with the table you created, that is fine, but again, we would need to add a column with hours. We would also need to add a column for the vendors to resubmit their pricing based on a somewhat equalized level of effort.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Lopes Metcalfe, Christine (GOV) <[REDACTED]>
Sent: Monday, May 3, 2021 3:30 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Danusis, Kristen
<[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Hello All,

Based on the conversation this morning, we identified the level of supports needed in an effort to provide more clarity on expectations for the engagement. I've updated the draft Kristen prepared and if purchasing has any tools to help quantify the support into hours that would be helpful – and as mentioned below all communications should continue through purchasing with any vendors.

Please let me know if I can provide any additional information to assist with understanding the

scopes.

Best
Christine

Christine Lopes Metcalfe

Senior Advisor on Education
Office of the Governor Daniel J. McKee
State House
Providence, RI 02903

From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Monday, May 3, 2021 3:07 PM
To: Danusis, Kristen <[REDACTED]>
Cc: Lopes Metcalfe, Christine (GOV) <[REDACTED]> Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

That is generally fine, but I would like to review the document before it is sent to the vendors. Also, because we are in the middle of a procurement, communicating with the vendors should be handled formally by Nina Lennon in the Division of Purchases. Therefore, please send me the document once it is in final form.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Danusis, Kristen <[REDACTED]>
Sent: Monday, May 3, 2021 2:59 PM
To: Majcher, Daniel (DOA) <[REDACTED]>
Subject: Re: [EXTERNAL] : Re: Education RFP

A team from RIDE, RIDOH, and EdOC met this AM with Christine Lopes-Metcalf. We decided to create a document that added they type of support that was needed (technical assistance and/or directly staffed on the ground support) for each of the tasks within the RFP. I started the draft and sent it out to the team. Christine agreed to finalize it by EOD. My understanding was that she would send it out to ILO Group & WestEd to see if they wanted to submit a supplemental proposal based on the more specific scope of work. Call me if you have any questions: [REDACTED].

From: "Majcher, Daniel (DOA)" <[REDACTED]>
Date: Monday, May 3, 2021 at 1:36 PM
To: "Danusis, Kristen" <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Just checking in on this. How is it going?

Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:18 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Danusis, Kristen <[REDACTED]>

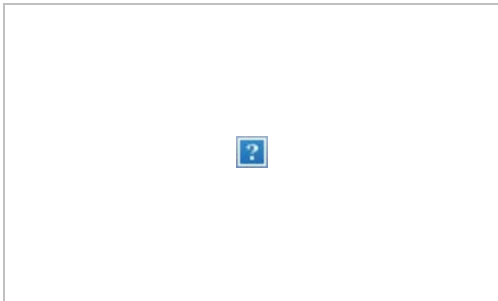
Subject: RE: [EXTERNAL] : Re: Education RFP

Thank you, Dan.

Anyone that is brought into discussions with this RFP needs to be vetted and sign a COI form – they can be an advisor if there is no conflict.

<https://www.ridop.ri.gov/StateAgencyInfoCenter/DocsForms/conflict-of-interest-form.docx>

Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

Weekly MPA Active contract report in MSExcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

UPDATE - The OSP Bid Board is LIVE. Active Open Enrollments (formerly continuous recruitments) are posted to the Bid Board. OSP Login is LIVE at <https://www.ridop.ri.gov/osp-login/>. View all Bidding Opportunities at <https://www.ridop.ri.gov/solicitations/>. Vendor Registration remains available at <https://www.ridop.ri.gov/osp/osp-vendor-registration.php>.

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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:07 PM
To: Danusis, Kristen <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Ana is an employee of RIDE and she understands that the proposals are confidential at present? I think that makes sense and would be okay with it, but I am looping in Nina from Purchases to make sure that is not an issue from her perspective.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Danusis, Kristen <[REDACTED]>
Sent: Friday, April 30, 2021 12:00 PM
To: Majcher, Daniel (DOA) <[REDACTED]>
Subject: Re: [EXTERNAL] : Re: Education RFP

Am I able to share the two final proposals with Ana Riley at RIDE so she has an understanding of the differences and scope and hours as we make our recommendations?

From: "Majcher, Daniel (DOA)" <[REDACTED]>
Date: Friday, April 30, 2021 at 10:53 AM
To: "Danusis, Kristen" <[REDACTED]> "McCarthy, Thomas (RIDOH)" <[REDACTED]>
<[REDACTED]> "Lopes Metcalfe, Christine (GOV)" <[REDACTED]>
<[REDACTED]> "Riley, Ana" <[REDACTED]>
Cc: Mayors Office <[REDACTED]> Nina Lennon <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Good Morning,

I appreciate your assistance with trying to better define the level of effort necessary for these consulting services. The RFP provides the following components:

- i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;*
- ii. advice to State of Rhode Island government from the Governor through and including the*

Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;

iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;

iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;

v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;

vi. equity review and initiatives;

vii. development of metrics and accountability of outcomes relevant to program implementation and organization;

viii. higher education needs assessment relative to in person reopening of state colleges and universities, and

ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.

I am thinking the best approach may be to provide a range of estimated hours that we anticipate for each of these items, but I will defer to you whether there is a different way to organize this.

The Division of Purchases is anxious about the procurement timeline, so if you can give me an idea when you will have something, that would be great! I am hoping by the end of the day or by Monday AM, but let me know.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Danusis, Kristen <[REDACTED]>
Sent: Thursday, April 29, 2021 3:06 PM
To: McCarthy, Thomas (RIDOH) <[REDACTED]> Majcher, Daniel (DOA) <[REDACTED]> Mayors Office <[REDACTED]> Lopes Metcalfe, Christine (GOV) <[REDACTED]>
Cc: Riley, Ana <[REDACTED]>
Subject: [EXTERNAL] : Re: Education RFP

I will happily work with Christine again Adding Ana Riley here as she would like to have input as well.

From: "McCarthy, Thomas (RIDOH)" <[REDACTED]>
Date: Thursday, April 29, 2021 at 3:03 PM
To: "Majcher, Daniel (DOA)" <[REDACTED]> Mayors Office <[REDACTED]> "Danusis, Kristen" <[REDACTED]> "Lopes Metcalfe, Christine (GOV)" <[REDACTED]>
Subject: Education RFP

Good afternoon team,

I wanted to introduce you to Christine Lopes-Metcalf, the senior education advisor in the Governor's Office.

Christine,

This group is working to complete the evaluation for an RFP tied to delivering on the Governor's education and supporting municipalities in fully reopening schools next year, building upon the outcomes of the LEAP task force, and working to establish municipal education departments. I spoke with Tony Afonso and he asked that we work with you to develop a rough sizing of what we think the engagement would require to deliver on the Governor's intent. Kristen Danusis and RIDE have taken a first pass at the sizing but we want to make sure we're fully aligned with the Governor's expectations. Can you please work with Kristen to help flesh out what we would assess the minimum level of effort would be so that we can ask the vendors to bid accordingly?

Thank you,
Tom

Tom McCarthy
Executive Director, COVID Response
Rhode Island Department of Health
100 Sockanosset Crossroads
Cranston, RI 02920

(c) [REDACTED]

Maggie Torres
Executive Assistant to the Executive Director



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Instructions: Please review the "Estimated Level of Effort" column on the next tab. Please then complete table on the next tab with your best and final proposed rates, level of effort, and best and final fully loaded blended (all inclusive rates). Last, please confirm and/or explain the following:

1. The proposed team provided in your proposal can deliver the level of effort stated in the next tab (yes or no).

2. If not, please specify whether you wish to withdraw from consideration or how you will otherwise meet the requirements of the RFP.

3. Please confirm that the proposed work plan, approach and methodology will does not change based on the anticipated level of effort provided in the following tab.

	(Provided by State)		Provided by Vendor:			
<u>Estimated Level of Effort By Component</u>	<u>State's Estimated Level of Effort (hours) - Minimum</u>	<u>State's Estimated Level of Effort (hours) - Max</u>	<u>Vendor's Itemized Rates (Title and \$)</u>	<u>Vendor's Proposed Level of Effort (Hours)</u>	<u>Vendor's fully loaded Blended Rate (\$)</u>	<u>Cost (Level of Effort x Fully Loaded Blended Rate)</u>
i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;	3000	4000				\$0
ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;	1500	2000				\$0
iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;	3000	4000				\$0
iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;	9000	10750				\$0
v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;	1000	2000				\$0
vi. equity review and initiatives;	1250	1500				\$0
vii. development of metrics and accountability of outcomes relevant to program implementation and organization;	500	750				\$0
viii. higher education needs assessment relative to in person reopening of state colleges and universities, and	750	1000				\$0
ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.	2000	3000				\$0
	22000	29000	Total Hours:	0	Total Cost:	\$0

Instructions: Please review the "Estimated Level of Effort" column on the next tab. Please then complete table on the next tab with your best and final proposed rates, level of effort, and best and final fully loaded blended (all inclusive rates). Last, please confirm and/or explain the following:

1. The proposed team provided in your proposal can deliver the level of effort stated in the next tab (yes or no).

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3. Please confirm that the proposed work plan, approach and methodology will does not change based on the anticipated level of effort provided in the following tab.

<i>Estimated Level of Effort By Component</i>	(Provided by State)		Provided by Vendor:			
	<i>State's Estimated Level of Effort (hours) - Minimum</i>	<i>State's Estimated Level of Effort (hours) - Max</i>	<i>Vendor's Itemized Rates (Title and \$)</i>	<i>Vendor's Proposed Level of Effort (Hours)</i>	<i>Vendor's fully loaded Blended Rate (\$)</i>	<i>Cost (Level of Effort x Fully Loaded Blended Rate)</i>
i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;	1500	2000				\$0
ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;	1500	2000				\$0
iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;	1500	2000				\$0
iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;	12000	15000				\$0
v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;	2000	3000				\$0
vi. equity review and initiatives;	1000	1500				\$0
vii. development of metrics and accountability of outcomes relevant to program implementation and organization;	750	1000				\$0
viii. higher education needs assessment relative to in person reopening of state colleges and universities, and	1250	1500				\$0
ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.	500	1000				\$0
	22000	29000	Total Hours:	0	Total Cost:	\$0

From: [Majcher, Daniel \(DOA\)](#)
To: [Lopes Metcalfe, Christine \(GOV\)](#); [McCarthy, Thomas \(RIDOH\)](#); [Danusis, Kristen](#); [Mayors Office](#)
Cc: [McIntyre, Nancy \(DOA\)](#); [Lennon, Nina \(DOA\)](#)
Subject: RE: [EXTERNAL] : Re: Education RFP
Date: Wednesday, May 5, 2021 8:42:00 AM
Attachments: [image001.jpg](#)
[image002.jpg](#)
[image003.jpg](#)
[image004.jpg](#)
[Estimated Level of Effort -- Best and Final Pricing.xlsx](#)

Thank you Christine.

Nina—I changed the file name and made a couple of minor edits to the instructions, but attached is the final spreadsheet. Please send this to finalist vendors with a very short turn-around time to get this back to us.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Lopes Metcalfe, Christine (GOV) <[REDACTED]>
Sent: Tuesday, May 4, 2021 5:51 PM
To: Majcher, Daniel (DOA) <[REDACTED]> McCarthy, Thomas (RIDOH)
<[REDACTED]> Danusis, Kristen <[REDACTED]> Mayors Office
<[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> Lennon, Nina (DOA)
<[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Daniel,
Attached are my thoughts on estimated effort by component and welcome feedback or any

questions.
-Christine

Christine Lopes Metcalfe

Senior Advisor on Education
Office of the Governor Daniel J. McKee
State House
Providence, RI 02903

From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Tuesday, May 4, 2021 4:08 PM
To: Lopes Metcalfe, Christine (GOV) <[REDACTED]> McCarthy, Thomas (RIDOH) <[REDACTED]> Danusis, Kristen <[REDACTED]> Mayors Office <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Christine,

We need to get this wrapped up. My understanding is that the expectation from the Governor is that this will not be less than 22,000 hours for this project. I have added columns (B and C) with suggested hours for each item in the RFP. I did my best with my limited experience to provide some estimates in each of the categories.

Please review and comment by the end of the day on whether any of the hours should be adjusted for columns B and C. Tomorrow morning we will send to the finalist vendors for their submission.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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the sender by e-mail or telephone and permanently delete all copies of this e-mail and any attachments.

From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Tuesday, May 4, 2021 3:17 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Lopes Metcalfe, Christine (GOV) <[REDACTED]> Danusis, Kristen <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]> McCarthy, Thomas (RIDOH) <[REDACTED]> Riley, Ana <[REDACTED]> Hinck, Kurt (RIDOH-Contractor) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

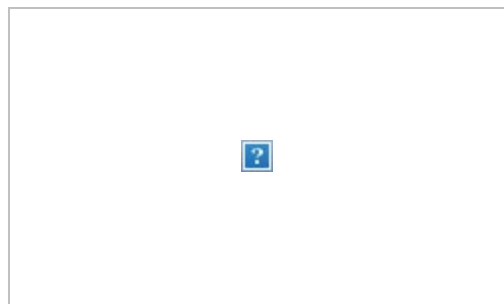
Greetings Team,

I just reviewed the document titled 'Reopening Schools RFP: Scope of Work' and want to be clear that the State is not in the position to change the scope of work in the RFP that is posted. The options are to instruct the vendors to submit a final budget with specific instructions or to cancel the bid to continue to vet the scope as a team.

Please let me know how you would like to proceed.

Kurt: Please submit a COI letter ASAP.

Thank you,
Nina



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Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

Weekly MPA Active contract report in MSExcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

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From: Majcher, Daniel (DOA) <[REDACTED]>

Sent: Monday, May 3, 2021 3:53 PM

To: Lopes Metcalfe, Christine (GOV) <[REDACTED]> Danusis, Kristen <[REDACTED]>

Cc: Lennon, Nina (DOA) <[REDACTED]>

Subject: RE: [EXTERNAL] : Re: Education RFP

Christine,

Thank you for sending. I agree, we need to provide some guidance to the three final vendors in terms of hours. Would it be possible to add column and have a range or maybe a maximum amount of hours stated into the table you sent? Is there a budget for this project and maybe you can work backwards from there to figure out a range of hours?

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From: Lopes Metcalfe, Christine (GOV) <[REDACTED]>

Sent: Monday, May 3, 2021 3:30 PM

To: Majcher, Daniel (DOA) <[REDACTED]> Danusis, Kristen <[REDACTED]>

Cc: Lennon, Nina (DOA) <[REDACTED]>

Subject: RE: [EXTERNAL] : Re: Education RFP

Hello All,

Based on the conversation this morning, we identified the level of supports needed in an effort to provide more clarity on expectations for the engagement. I've updated the draft Kristen prepared and if purchasing has any tools to help quantify the support into hours that would be helpful – and as mentioned below all communications should continue through purchasing with any vendors.

Please let me know if I can provide any additional information to assist with understanding the scopes.

Best
Christine

Christine Lopes Metcalfe

Senior Advisor on Education
Office of the Governor Daniel J. McKee
State House
Providence, RI 02903

From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Monday, May 3, 2021 3:07 PM
To: Danusis, Kristen <[REDACTED]>
Cc: Lopes Metcalfe, Christine (GOV) <[REDACTED]> Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

That is generally fine, but I would like to review the document before it is sent to the vendors. Also, because we are in the middle of a procurement, communicating with the vendors should be handled formally by Nina Lennon in the Division of Purchases. Therefore, please send me the document once it is in final form.

Thanks,
Dan

Daniel W. Majcher, Esq.
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From: Danusis, Kristen <[REDACTED]>

Sent: Monday, May 3, 2021 2:59 PM

To: Majcher, Daniel (DOA) <[REDACTED]>

Subject: Re: [EXTERNAL] : Re: Education RFP

A team from RIDE, RIDOH, and EdOC met this AM with Christine Lopes-Metcalf. We decided to create a document that added they type of support that was needed (technical assistance and/or directly staffed on the ground support) for each of the tasks within the RFP. I started the draft and sent it out to the team. Christine agreed to finalize it by EOD. My understanding was that she would send it out to ILO Group & WestEd to see if they wanted to submit a supplemental proposal based on the more specific scope of work. Call me if you have any questions: [REDACTED]

From: "Majcher, Daniel (DOA)" <[REDACTED]>

Date: Monday, May 3, 2021 at 1:36 PM

To: "Danusis, Kristen" <[REDACTED]>

Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Just checking in on this. How is it going?

Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
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One Capitol Hill, 4th Fl.
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Fax: [REDACTED]

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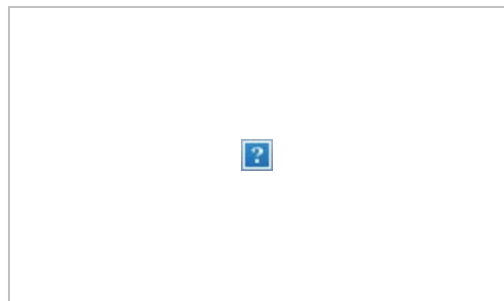
From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:18 PM
To: Majcher, Daniel (DOA) <[REDACTED]> Danusis, Kristen <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Thank you, Dan.

Anyone that is brought into discussions with this RFP needs to be vetted and sign a COI form – they can be an advisor if there is no conflict.

<https://www.ridop.ri.gov/StateAgencyInfoCenter/DocsForms/conflict-of-interest-form.docx>

Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:07 PM
To: Danusis, Kristen <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>

Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Ana is an employee of RIDE and she understands that the proposals are confidential at present? I think that makes sense and would be okay with it, but I am looping in Nina from Purchases to make sure that is not an issue from her perspective.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
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Fax: [REDACTED]

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From: Danusis, Kristen <[REDACTED]>
Sent: Friday, April 30, 2021 12:00 PM
To: Majcher, Daniel (DOA) <[REDACTED]>
Subject: Re: [EXTERNAL] : Re: Education RFP

Am I able to share the two final proposals with Ana Riley at RIDE so she has an understanding of the differences and scope and hours as we make our recommendations?

From: "Majcher, Daniel (DOA)" <[REDACTED]>
Date: Friday, April 30, 2021 at 10:53 AM
To: "Danusis, Kristen" <[REDACTED]> "McCarthy, Thomas (RIDOH)" <[REDACTED]> "Lopes Metcalfe, Christine (GOV)" <[REDACTED]> "Riley, Ana" <[REDACTED]>
Cc: Mayors Office <[REDACTED]> Nina Lennon <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Good Morning,

I appreciate your assistance with trying to better define the level of effort necessary for these consulting services. The RFP provides the following components:

i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;

ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;

iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;

iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;

v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;

vi. equity review and initiatives;

vii. development of metrics and accountability of outcomes relevant to program implementation and organization;

viii. higher education needs assessment relative to in person reopening of state colleges and universities, and

ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.

I am thinking the best approach may be to provide a range of estimated hours that we anticipate for each of these items, but I will defer to you whether there is a different way to organize this.

The Division of Purchases is anxious about the procurement timeline, so if you can give me an idea when you will have something, that would be great! I am hoping by the end of the day or by Monday AM, but let me know.

Thanks,

Dan

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From: Danusis, Kristen <[REDACTED]>
Sent: Thursday, April 29, 2021 3:06 PM
To: McCarthy, Thomas (RIDOH) <[REDACTED]> Majcher, Daniel (DOA) <[REDACTED]> Mayors Office <[REDACTED]> Lopes Metcalfe, Christine (GOV) <[REDACTED]>
Cc: Riley, Ana <[REDACTED]>
Subject: [EXTERNAL] : Re: Education RFP

I will happily work with Christine again Adding Ana Riley here as she would like to have input as well.

From: "McCarthy, Thomas (RIDOH)" <[REDACTED]>
Date: Thursday, April 29, 2021 at 3:03 PM
To: "Majcher, Daniel (DOA)" <[REDACTED]> Mayors Office <[REDACTED]> "Danusis, Kristen" <[REDACTED]> "Lopes Metcalfe, Christine (GOV)" <[REDACTED]>
Subject: Education RFP

Good afternoon team,

I wanted to introduce you to Christine Lopes-Metcalfe, the senior education advisor in the Governor's Office.

Christine,

This group is working to complete the evaluation for an RFP tied to delivering on the

Governor's education and supporting municipalities in fully reopening schools next year, building upon the outcomes of the LEAP task force, and working to establish municipal education departments. I spoke with Tony Afonso and he asked that we work with you to develop a rough sizing of what we think the engagement would require to deliver on the Governor's intent. Kristen Danusis and RIDE have taken a first pass at the sizing but we want to make sure we're fully aligned with the Governor's expectations. Can you please work with Kristen to help flesh out what we would assess the minimum level of effort would be so that we can ask the vendors to bid accordingly?

Thank you,
Tom

Tom McCarthy
Executive Director, COVID Response
Rhode Island Department of Health
100 Sockanosset Crossroads
Cranston, RI 02920
(c) [REDACTED]
[REDACTED]

Maggie Torres
Executive Assistant to the Executive Director
[REDACTED]



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FW: [EXTERNAL] : Re: Education RFP

From: "Majcher, Daniel (DOA)" <[REDACTED]>
To: "Thorsen, Jim (DOA)" <[REDACTED]>
Date: Wed, 05 May 2021 08:45:02 -0400
Attachments: Estimated Level of Effort -- Best and Final Pricing.xlsx (23.95 kB)

Jim,

Here is an update: Christine sent me back a spreadsheet with the hours adjusted in each of the categories. I finalized it and sent it to Nina Lennon to forward to the finalist vendors this morning.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
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One Capitol Hill, 4th Fl.
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From: Majcher, Daniel (DOA)
Sent: Wednesday, May 5, 2021 8:43 AM
To: Lopes Metcalfe, Christine (GOV) <[REDACTED]>; McCarthy, Thomas (RIDOH) <[REDACTED]>; Danusis, Kristen <[REDACTED]>; [REDACTED] Mayors Office <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]>; Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Thank you Christine.

Nina—I changed the file name and made a couple of minor edits to the instructions, but attached is the final spreadsheet. Please send this to finalist vendors with a very short turn-around time to get this back to us.

Thanks,
Dan

Daniel W. Majcher, Esq.
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From: Lopes Metcalfe, Christine (GOV) <[REDACTED]>
Sent: Tuesday, May 4, 2021 5:51 PM

To: Majcher, Daniel (DOA) <[REDACTED]>; McCarthy, Thomas (RIDOH) <[REDACTED]>; Danusis, Kristen <[REDACTED]> Mayors Office <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]>; Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Daniel,
Attached are my thoughts on estimated effort by component and welcome feedback or any questions.
-Christine

Christine Lopes Metcalfe
Senior Advisor on Education
Office of the Governor Daniel J. McKee
State House
Providence, RI 02903
[REDACTED]

From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Tuesday, May 4, 2021 4:08 PM
To: Lopes Metcalfe, Christine (GOV) <[REDACTED]>; McCarthy, Thomas (RIDOH) <[REDACTED]>; Danusis, Kristen <[REDACTED]> Mayors Office <[REDACTED]>
Cc: McIntyre, Nancy (DOA) <[REDACTED]>; Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Christine,

We need to get this wrapped up. My understanding is that the expectation from the Governor is that this will not be less than 22,000 hours for this project. I have added columns (B and C) with suggested hours for each item in the RFP. I did my best with my limited experience to provide some estimates in each of the categories.

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Sent: Tuesday, May 4, 2021 3:17 PM
To: Majcher, Daniel (DOA) <[REDACTED]>; Lopes Metcalfe, Christine (GOV) <[REDACTED]>; Danusis, Kristen <[REDACTED]>
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Please let me know how you would like to proceed.

Kurt: Please submit a COI letter ASAP.

Thank you,
Nina

Nina M. Lennon
 State of Rhode Island
 Interdepartmental
 Project Manager

Division of Purchases
 One Capitol Hill
 Providence, RI 02908-5855

[Redacted] Work

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Sent: Monday, May 3, 2021 3:53 PM
To: Lopes Metcalfe, Christine (GOV) <[Redacted]>; Danusis, Kristen
 <[Redacted]>
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Subject: RE: [EXTERNAL] : Re: Education RFP

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Sent: Monday, May 3, 2021 3:30 PM
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Best
Christine

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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Monday, May 3, 2021 3:07 PM
To: Danusis, Kristen <[REDACTED]>
Cc: Lopes Metcalfe, Christine (GOV) <[REDACTED]>; Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

That is generally fine, but I would like to review the document before it is sent to the vendors. Also, because we are in the middle of a procurement, communicating with the vendors should be handled formally by Nina Lennon in the Division of Purchases. Therefore, please send me the document once it is in final form.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Danusis, Kristen <[REDACTED]>
Sent: Monday, May 3, 2021 2:59 PM
To: Majcher, Daniel (DOA) <[REDACTED]>
Subject: Re: [EXTERNAL] : Re: Education RFP

A team from RIDE, RIDOH, and EdOC met this AM with Christine Lopes-Metcalfe. We decided to create a document that added they type of support that was needed (technical assistance and/or directly staffed on the ground support) for each of the tasks within the RFP. I started the draft and sent it out to the team. Christine agreed to finalize it by EOD. My understanding was that she would send it out to ILO Group & WestEd to see if they wanted to submit a supplemental proposal based on the more specific scope of work. Call me if you have any questions: [REDACTED]

From: "Majcher, Daniel (DOA)" <[REDACTED]>
Date: Monday, May 3, 2021 at 1:36 PM
To: "Danusis, Kristen" <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Just checking in on this. How is it going?

Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Lennon, Nina (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:18 PM
To: Majcher, Daniel (DOA) <[REDACTED]>; Danusis, Kristen <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Thank you, Dan.

Anyone that is brought into discussions with this RFP needs to be vetted and sign a COI form – they can be an advisor if there is no conflict.

<https://www.ridop.ri.gov/StateAgencyInfoCenter/DocsForms/conflict-of-interest-form.docx>

Nina



Get implementation updates at: <https://www.ridop.ri.gov/osp/whats-new.php>

Agency users can get Contract Board search quick tips at: <https://www.ridop.ri.gov/documents/contract-board-search-instructions.pdf>

Weekly MPA Active contract report in MSEXcel format under the Contract Board icon at: <https://www.ridop.ri.gov/>

UPDATE - The OSP Bid Board is LIVE. Active Open Enrollments (formerly continuous recruitments) are posted to the Bid Board. OSP Login is LIVE at <https://www.ridop.ri.gov/osp-login/>. View all Bidding Opportunities at <https://www.ridop.ri.gov/solicitations/>. Vendor Registration remains available at <https://www.ridop.ri.gov/osp/osp-vendor-registration.php>.

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From: Majcher, Daniel (DOA) <[REDACTED]>
Sent: Friday, April 30, 2021 12:07 PM

To: Danusis, Kristen <[REDACTED]>
Cc: Lennon, Nina (DOA) <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Kristen,

Ana is an employee of RIDE and she understands that the proposals are confidential at present? I think that makes sense and would be okay with it, but I am looping in Nina from Purchases to make sure that is not an issue from her perspective.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
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Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Danusis, Kristen <[REDACTED]>
Sent: Friday, April 30, 2021 12:00 PM
To: Majcher, Daniel (DOA) <[REDACTED]>
Subject: Re: [EXTERNAL] : Re: Education RFP

Am I able to share the two final proposals with Ana Riley at RIDE so she has an understanding of the differences and scope and hours as we make our recommendations?

From: "Majcher, Daniel (DOA)" <[REDACTED]>
Date: Friday, April 30, 2021 at 10:53 AM
To: "Danusis, Kristen" <[REDACTED]>, "McCarthy, Thomas (RIDOH)" <[REDACTED]>, "Lopes Metcalfe, Christine (GOV)" <[REDACTED]>, "Riley, Ana" <[REDACTED]>
Cc: Mayors Office <[REDACTED]>, Nina Lennon <[REDACTED]>
Subject: RE: [EXTERNAL] : Re: Education RFP

Good Morning,

I appreciate your assistance with trying to better define the level of effort necessary for these consulting services. The RFP provides the following components:

- i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;*
- ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;*
- iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;*
- iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;*
- v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;*

vi. equity review and initiatives;

vii. development of metrics and accountability of outcomes relevant to program implementation and organization;

viii. higher education needs assessment relative to in person reopening of state colleges and universities, and

ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.

I am thinking the best approach may be to provide a range of estimated hours that we anticipate for each of these items, but I will defer to you whether there is a different way to organize this.

The Division of Purchases is anxious about the procurement timeline, so if you can give me an idea when you will have something, that would be great! I am hoping by the end of the day or by Monday AM, but let me know.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: [REDACTED]

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From: Danusis, Kristen <[REDACTED]>
Sent: Thursday, April 29, 2021 3:06 PM
To: McCarthy, Thomas (RIDOH) <[REDACTED]>; Maicher, Daniel (DOA) <[REDACTED]>; Mayors Office <[REDACTED]>; Lopes Metcalfe, Christine (GOV) <[REDACTED]>
Cc: Riley, Ana <[REDACTED]>
Subject: [EXTERNAL] : Re: Education RFP

I will happily work with Christine again 😊 Adding Ana Riley here as she would like to have input as well.

From: "McCarthy, Thomas (RIDOH)" <[REDACTED]>
Date: Thursday, April 29, 2021 at 3:03 PM
To: "Majcher, Daniel (DOA)" <[REDACTED]>, Mayors Office <[REDACTED]>, "Danusis, Kristen" <[REDACTED]>, "Lopes Metcalfe, Christine (GOV)" <[REDACTED]>
Subject: Education RFP

Good afternoon team,

I wanted to introduce you to Christine Lopes-Metcalf, the senior education advisor in the Governor's Office.

Christine,

This group is working to complete the evaluation for an RFP tied to delivering on the Governor's education and supporting municipalities in fully reopening schools next year, building upon the outcomes of the LEAP task force, and working to establish municipal education departments. I spoke with Tony Afonso and he asked that we work with you to develop a rough sizing of what we think the engagement would require to deliver on the Governor's intent. Kristen Danusis and RIDE have taken a first pass at the sizing but we want to make sure we're fully aligned with the Governor's expectations. Can you please work with Kristen to help flesh out what we would assess the minimum level of effort would be so that we can ask the vendors to bid accordingly?

Thank you,
Tom

Tom McCarthy
Executive Director, COVID Response
Rhode Island Department of Health
100 Sockanosset Crossroads
Cranston, RI 02920

[REDACTED]

Maggie Torres
Executive Assistant to the Executive Director

[REDACTED]



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Instructions: Please review the "Estimated Level of Effort" column on the next tab. Please then complete table on the next tab with your best and final proposed rates, level of effort, and best and final fully loaded blended (all inclusive rates). Last, please confirm and/or explain the following:

1. The proposed team provided in your proposal can deliver the level of effort stated in the next tab (Yes or No).

1b. If not, please specify whether you wish to withdraw from consideration or how you will otherwise meet the requirements of the RFP.

2. Please confirm that the proposed work plan, approach and methodology will does not change based on the anticipated level of effort provided in the following tab. (Yes or No)

<i>Estimated Level of Effort By Component</i>	(Provided by State)		Provided by Vendor:			
	<i>State's Estimated Level of Effort (hours) - Minimum</i>	<i>State's Estimated Level of Effort (hours) - Max</i>	<i>Vendor's Itemized Rates (Title and \$)</i>	<i>Vendor's Proposed Level of Effort (Hours)</i>	<i>Vendor's fully loaded Blended Rate (\$)</i>	<i>Cost (Level of Effort x Fully Loaded Blended Rate)</i>
i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;	3000	4000				\$0
ii. advice to State of Rhode Island government from the Governor through and including the Rhode Island Department of Education and the Rhode Island Department of Health with respect to school reopening activities organization and communication;	1500	2000				\$0
iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;	3000	4000				\$0
iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;	9000	10750				\$0
v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;	1000	2000				\$0
vi. equity review and initiatives;	1250	1500				\$0
vii. development of metrics and accountability of outcomes relevant to program implementation and organization;	500	750				\$0
viii. higher education needs assessment relative to in person reopening of state colleges and universities, and	750	1000				\$0
ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.	2000	3000				\$0
	22000	29000		0	Total Cost:	\$0

Instructions: Please review the "Estimated Level of Effort" column on the next tab. Please then complete table on the next tab with your best and final proposed rates, level of effort, and best and final fully loaded blended (all inclusive rates). Last, please confirm and/or explain the following:

1. The proposed team provided in your proposal can deliver the level of effort stated in the next tab (Yes or No).

1b. If not, please specify whether you wish to withdraw from consideration or how you will otherwise meet the requirements of the RFP.

2. Please confirm that the proposed work plan, approach and methodology will does not change based on the anticipated level of effort provided in the following tab. (Yes or No)

<i>Estimated Level of Effort By Component</i>	(Provided by State)		Provided by Vendor:			
	<i>State's Estimated Level of Effort (hours) - Minimum</i>	<i>State's Estimated Level of Effort (hours) - Max</i>	<i>Vendor's Itemized Rates (Title and \$)</i>	<i>Vendor's Proposed Level of Effort (Hours)</i>	<i>Vendor's fully loaded Blended Rate (\$)</i>	<i>Cost (Level of Effort x Fully Loaded Blended Rate)</i>
i. COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students;	3000	4000				\$0
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iii. advice, consultation and project management support with respect to expenditure and prioritization of American Rescue Plan and other relevant federal funds to address learning loss, catch up and accelerated learning;	3000	4000				\$0
iv. planning, program development and implementation of municipal learning programs of Cities and Towns in the State including municipal programs not directly administered by LEAs and/or traditional school committees to address lost learning and catch up and long-term learning programs;	9000	10750				\$0
v. program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening;	1000	2000				\$0
vi. equity review and initiatives;	1250	1500				\$0
vii. development of metrics and accountability of outcomes relevant to program implementation and organization;	500	750				\$0
viii. higher education needs assessment relative to in person reopening of state colleges and universities, and	750	1000				\$0
ix. act as lead project manager for setting up pool testing for public schools, K through 12, Rhode Island Office of Higher Education, public colleges and universities as well as coordination of communication regarding same.	2000	3000				\$0
	22000	29000		0	Total Cost:	\$0

From: [Majcher, Daniel \(DOA\)](#)
To: [Stolle, Fred \(DOA\)](#); [Shaw, Jenny \(DOA\)](#)
Subject: Majcher, Daniel (DOA) shared the folder "Reopening Plan Consulting Services" with you.
Date: Monday, May 10, 2021 1:32:56 PM
Attachments: [AttachedImage](#)
[AttachedImage](#)
[AttachedImage](#)
[AttachedImage](#)
[AttachedImage](#)



Majcher, Daniel (DOA) shared a folder with you

Here are my records related to the Reopening Plan Consulting Services. These records are not public and include the unredacted proposals. I am copying Jenny who can either put these records on a CD-ROM disk or help you download these files.

I was not involved in the creation or the posting of the RFP, and only was assigned by the Director to handle the review process. Thus, I do not have access to records prior to my involvement or that were not shared directly with me.



Reopening Plan Consulting Services



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From: [Majcher, Daniel \(DOA\)](#)
To: [Stolle, Fred \(DOA\)](#); [Shaw, Jenny \(DOA\)](#)
Subject: RE: Majcher, Daniel (DOA) shared the folder "Reopening Plan Consulting Services" with you.
Date: Monday, May 10, 2021 1:52:07 PM
Attachments: [image007.png](#)
[image008.png](#)
[image009.png](#)
[image010.png](#)
[image011.png](#)
[image012.png](#)

Fred,

Just a further note on this, these records are required to be kept confidential.

Thanks,
Dan

Daniel W. Majcher, Esq.
R.I. Department of Administration
Legal Services
One Capitol Hill, 4th Fl.
Providence, RI 02908
Tel: [REDACTED]
Fax: ([REDACTED])

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From: Majcher, Daniel (DOA)
Sent: Monday, May 10, 2021 1:33 PM
To: Stolle, Fred (DOA) <[REDACTED]> Shaw, Jenny (DOA) <[REDACTED]>
Subject: Majcher, Daniel (DOA) shared the folder "Reopening Plan Consulting Services" with you.



Majcher, Daniel (DOA) shared a folder with you

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Connors, Kelley (DOA)

From: Amanda Rivers <[REDACTED]>
Sent: Wednesday, May 12, 2021 2:45 PM
To: McIntyre, Nancy (DOA); Thorsen, Jim (DOA)
Subject: [EXTERNAL] : RE: Discussion w/ Governor McKee - For Awareness/Next Steps

Good Afternoon,

Please allow this communication to provide a memorialization and update as to my telephone conversation with Governor McKee this afternoon, both for awareness purposes and to identify the best course of action for next steps as needed.

The Governor raised some targeted questions regarding a pending RFP for an education services/school reopening project that originated from his office; specifically, Governor McKee is looking to determine whether there is any flexibility or option at this point in the process (which I understand to be that the committee has reviewed and scored both the technical and cost proposals, but that tentative award notices have not yet been issued) to award separate contracts to the two vendors with the highest qualifying scores and split the scope of work according to their original proposals. We discussed fiscal/budget considerations related to next steps as an aside, but my primary understanding is that the Governor is not sure whether the technical review committee picked up on a significant difference between the number of hours that the two vendors quoted to complete the scope of work as stated in the RFP while scoring the technical proposals. For future projects, I mentioned the option to add advisor/non-scoring members to a technical review committee that would benefit from additional insight and expertise in an appropriate capacity.

The Governor also inquired as to whether there is any opportunity during a competitive bid process to perhaps interview or query vendors in an effort to ensure that they fully understand the specific goals of the project and have the requisite capacity to complete those tasks. I have participated in RFP development where vendors were asked to prepare presentations to the technical review committee as part of the evaluation process, but that requirement had been clearly set forth up front in the RFP itself. I wanted to run this question by you both due to the critical and sensitive nature of an open bid process in order to guarantee adherence to the correct procedures and avoid any potential legal complications or exposure.

Finally, Governor McKee mentioned that he would like his team to be aware of new solicitations going forward (particularly those relating to specific projects and/or funding thresholds as a potential benchmark for collaboration), and to gain a deeper understanding of the competitive bid process/timelines overall. We discussed potentially convening regular meetings between designated staff from the Governor's Office and the Division of Purchases as one option to achieve this goal. The Governor plans on having a member of his team reach out to me as a point of contact for this effort, but of course, I defer to you both as to how you wish to proceed.

Please advise if I can provide any additional information or clarification as to these items; I look forward to speaking with you both further regarding the above, as well as to develop a strong entrance/transition plan for the Deputy Purchasing Agent position.

Very Truly Yours,

McKenna, Meredith (GOV)


From: Lopes Metcalfe, Christine (GOV)
Sent: Friday, June 4, 2021 3:06 PM
To: McCabe, Brenna M (GOV)
Subject: Scopes of work
Attachments: Prelimiary_DraftScopeofWork_WestEd.docx; Prelimiary_DraftScopeofWork_ILOGrou.docx

Brenna,

Attached are the draft scopes of work provided by Tony.

Let me know if you have any questions and when you connect with Tony please ask about joining the follow-up conversations because I think we're going to have to divide up some of this management up internally as well and it would be helpful to keep everyone in the loop.

best
-Christine

Christine Lopes Metcalfe
Senior Advisor on Education
Office of the Governor Daniel J. McKee
State House
Providence, RI 02903


WEST ED SCOPE

1. **Program Analysis and Evaluation: Municipal Programs, Summer Catch Up Programs, and State School Reopening.** Consultant will conduct a needs assessment to determine in person reopening feasibility at state colleges and universities, given the entity's size, student body makeup, commuter population, participation rate in sports and extracurriculars, and operating policies and regulations. This includes, but is not limited to, considerations of pooled COVID-19 testing. Consultant will assemble a small panel, including both researchers and practitioners, to develop a typology of interventions. If there are two to three or more interventions that are being implemented in multiple municipalities, have sufficient enrollment, and for which there is a credible comparison group, Consultant will evaluate the outcomes. If it is determined that an evaluation is not possible due to numbers or implementation decisions, then the Consultant will provide guidance on what is needed in future iterations for an evaluation to be possible. Consultant will also provide case studies of best practices in RI.
2. **Equity Review and Initiatives.** Consultant will conduct an equity review to examine the impact of learning loss on the most vulnerable students. The review will encompass a review of key programs across the state and within municipalities to provide recommendations for equity-focused strategies for recovery efforts.
3. **Metrics and Accountability of Outcomes.** Consultant will develop key metrics to monitor program execution and outcomes, including a process for monitoring implementation of reopening plans and innovations in education policy and practice in the state and municipalities. Consultant will build a custom RI-specific dashboard to monitor and publicly report out on progress toward key outcome metrics. Consultant will review progress with relevant RI government entities during project management meetings and as requested.

ILO GROUP SCOPE

1. **Project Management.** Consultant proposes to serve as the lead project manager for school reopening in Rhode Island. Project management will include organization, prioritization, and communication of all major project components. Consultant will coordinate communication and convenings between state and involved districts, lead organizations, and/or consultants, including scheduling and leading project meetings, drafting memos and summary documents, and coordinating the slide decks creation, in accordance with appropriate timelines and project scope.
2. **Prioritization of Federal Funds to Address Learning Loss.** Consultant will support RI leaders in establishing goals to be achieved with federal relief funding. Planning and resource allocation decisions will consider federal funding sources to include ongoing ESEA funds, such as Title 1 part a, IDEA, Title 2, Title 4, and McKinney-Vento, and recent relief funds to include ESSER I (CARES Act), ESSER II (CRRSA Act), ESSER III (ARP Act), and the American Jobs Plan. Consultant may include design criteria such as which students and schools could receive funding? What tradeoffs could be made in precision of the intervention? What type of investment should be considered (e.g., one-time grant, capital investment)? The customizable tool will help guide allocations, manage existing and expanded partnerships, and identify short term opportunities and will include practical tips and implementation guidelines for district leaders. Consultant will share examples of what other states and school systems have done or are planning and will interview state and local leaders to understand what investments are already in place or planned in RI. Consultant will provide advice and consultation on how the funds should be divided, who and what they should be divided between, how they should be dispersed, how they should be spent, and over what time period. This includes long-term planning for sustainability. Once decisions are made by RI leaders, Consultant will lead weekly project management meetings to monitor expenditures in response to RI leader priorities.
3. **Municipal Learning Programs.** Consultant will plan for and lead a process to support RI leaders and stakeholders in developing municipal learning programs within RI to assist districts and their constituents. Details of the methodology and approach are included in Section D and include assessing current needs and opportunities with a focus on under resourced areas, convening stakeholders to engage in community-based design, evaluating content and service providers, and highlighting criteria for successful implementation and long-term sustainability. Consultant will also advise on how to leverage federal funding in this work. Consultant will prepare a first year implementation action plan that will be used as the basis for project management. Consultant will then lead project management efforts to ensure the implementation is successful. Consultant will design data dashboards to monitor progress and outcome measures, plan and prepare communication materials to keep stakeholders informed, create collaboration opportunities to discuss successful practices, and lead focus group conversations and

survey participating entities to gather first-hand perspective on the programs.

4. **Program Design: Municipal Programs, Summer Catch Up Programs, and State School Reopening.** Consultant will support RI leaders in designing municipal programs, summer catch up programs, and state school reopening using a modified version of the methodology and approach included in Section D to account for shorter timelines for summer and school reopening. Utilizing state and district data, Consultant will lead learning loss program design for RIDE and district partners to codify goals, outcomes, strategies, and activities that will be necessary for mitigating and overcoming learning loss in RI schools. Program components may include extended and/or additional learning time efforts, student progress monitoring systems, early-warning systems, and other research-based strategies. This plan will serve as a foundational document in addressing learning loss by being a comprehensive framework utilized in decision-making, resource allocation, and targeting differentiated support that improves state and district performance. Working closely with RIDE, Consultant will lead school reopening design for RIDE and program partners to codify goals, outcomes, strategies, and activities that will be necessary for the successful launch and execution within RI districts and schools. Consultant program design services may include developing a theory of action, identifying organization capacities and key leaders, designing implementation scenarios specific to reopening and testing in the RI K-12 environment, and defining and detailing program components. As explained in detail in the Evaluation and Review section, Consultant will include evaluation components into the design process to demonstrate program impact at all levels.

From: [Antonio Afonso](#)
To: [Michael Magee](#)
Subject: Revised Scope
Date: Saturday, June 5, 2021 3:52:25 PM
Attachments: [Preliminary_DraftScopeofWork_K12_EditJune5.docx](#)

Mike,

Attached is a redlined scope of work based on feedback received on the work already done or in progress and discussions about the likely direction of the health guidance from the CDC in the coming weeks. I would like to discuss this with you on the phone. Please let me know when today or tomorrow morning you might be available to get on the phone for about 15 minutes.

Tony

DRAFT PK-12 Scope Support

- 1. Project Management, Coordination and Design for School Reopening.** Consultant proposes to serve as the lead project manager for school reopening in Rhode Island with a primary focus on the health mitigation and testing strategy identified by RIDOH and the EDoC for the 2021-22 school year. Project management will include organization, prioritization, and communication of all major project components. Consultant will coordinate communication, engagement strategy and convenings between state and involved districts, lead organizations, and/or consultants, including scheduling and leading project meetings, drafting memos and summary documents, and coordinating the slide decks creation, in accordance with appropriate timelines and project scope. Consultant will support in implementation of engagement strategy with identified stakeholder groups.
- 2. Prioritization Use of Federal Funds to Address Learning Loss.** Consultant will support RI state and local leaders in achieving establishing the goals identified as part of the Learning, Equity, and Accelerated Pathway (LEAP) report and programs identified to be achieved with federal relief funding. Support in the Planning and resource allocation and effectiveness tracking on decisions will consider federal funding sources to include ongoing ESEA funds, such as Title 1 part a, IDEA, Title 2, Title 4, and McKinney-Vento, and recent relief funds to include ESSER I (CARES Act), ESSER II (CRRSA Act), ESSER III (ARP Act), and the American Jobs Plan. Consultant may provide supports in include design criteria such as how funds are effectively impacting learning acceleration for which students and schools, could receive funding? What tradeoffs could be made in precision of the intervention? What type of investment should be considered (e.g., one-time grant, capital investment)? The customizable tool will help guide allocations, manage existing and expanded partnerships, and identify short term opportunities and will include practical tips and implementation guidelines for district leaders. Consultant will share examples of what other states and school systems are have done or are planning, implement and provide regular updates on those efforts during the school year, and will interview state and local leaders to understand what investments are already in place or planned in RI. Consultant will provide advice and consultation on how the funds should be divided, who and what they should be divided between, how they should be dispersed, how they should be spent, and over what time period. This includes long-term planning for sustainability. Once decisions are made by RI leaders, Consultant will lead weekly project management meetings to monitor expenditures in response to RI leader priorities at both the state and local level.
- 3. Municipal Learning Programs.** Consultant will plan for and lead a process to support RI leaders and stakeholders in developing municipal learning programs within RI to assist districts and their constituents. The plan will

include Details of the methodology and approach are included in Section D and include assessing current needs and opportunities with a focus on under resourced areas, convening stakeholders to engage in community-based design, evaluating content and service providers, and highlighting criteria for successful implementation and long-term sustainability. Consultant will also advise on how to leverage federal funding in this work. Consultant will prepare a first year implementation action plan that will be used as the basis for project management. Consultant will then lead project management efforts to ensure the implementation is successful. Consultant will design data dashboards to monitor progress and outcome measures, plan and prepare communication materials to keep stakeholders informed, create collaboration opportunities to discuss successful practices, and lead focus group conversations and survey participating entities to gather first-hand perspective on the programs.

4. **Program Design: Municipal Programs, Out of School Time programs, Summer Catch Up Programs, and State School Reopening and ongoing Summer Catch Up Programs** - Consultant will support RI leaders in designing municipal programs, Out of School Time programs and summer catch up programs, and state school reopening using a modified and ongoing summer catch up programs version of the methodology and approach included in Section D to account for shorter timelines for summer and school reopening. Utilizing state and district data, Consultant will lead municipal partners lead learning loss program design for RIDE and district partners to codify goals, outcomes, strategies, and activities that will be necessary for mitigating and overcoming learning loss, in RI schools. Program components may include extended and/or additional learning time efforts, student progress monitoring systems, early-warning systems, and other research-based strategies. This plan will serve as a foundational document in addressing learning loss by being a comprehensive framework utilized in decision-making, resource allocation, and targeting differentiated support that improves state and district performance. Working closely with RIDE, Consultant will lead school reopening design for RIDE and program partners to codify goals, outcomes, strategies, and activities that will be necessary for the successful launch and execution within RI districts and schools. Consultant program design services may include developing a theory of action, identifying organization capacities and key leaders, designing implementation scenarios specific to reopening and testing in the RI K-12 environment, and defining and detailing program components. As explained in detail in the Evaluation and Review section, Consultant will include evaluation components into the design process to demonstrate program impact at all levels.

4.
5. **Equity Review and Initiatives**. Consultant will conduct an equity review to examine the impact of learning loss on the most vulnerable students. The review will encompass a review of key programs across the state and within

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municipalities to provide recommendations for equity-focused strategies for recovery efforts.

6. **Metrics and Accountability of Outcomes.** Consultant will develop key metrics to monitor program execution and outcomes, including a process for monitoring implementation of reopening plans and innovations in education policy and practice in the state and municipalities. Consultant will build a custom RI-specific dashboard to monitor and publicly report out on progress toward key outcome metrics. Consultant will review progress with relevant RI government entities during project management meetings and as requested.

DRAFT

From: [Schedule, Gov \(GOV\)](#)
To: [McKee, Daniel \(LTGOV\)](#); [Silva, Anthony \(GOV\)](#); [McCabe, Brenna M \(GOV\)](#); [Thorsen, Jim \(DOA\)](#); [McCarthy, Thomas \(RIDOH\)](#); [Michael Magee, Jr. - Personal \(\[REDACTED\] \)](#)
Cc: [Dube, Tabatha L \(GOV\)](#)
Subject: Virtual Meeting per Tony Silva

Join Zoom Meeting

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