

**THE
AGENCY
PROCUREMENT
FILE**

Strategic Planning and Performance Scoreboard

RFX No. 3120003047

PPRB
DISCRETIONARY
AUTHORITY

Any requests for exceptions to regulatory or statutory requirements

N/A

COMPLIANCE REVIEW

*Documentation regarding any compliance review(s) previously
conducted by OPSCR*

N/A

FUNDING SOURCE CONFLICT

*Written determination of conflict with funding source
procurement rules and action taken*

N/A

COMPETITION, FAIRNESS, AND TRANSPARENCY

*Legitimate business reason(s) for decisions impacting
competition, fairness, or transparency of procurement*

N/A

PRESERVATION OF PROCUREMENT

*A memorandum explaining any decisions made to preserve
procurement*

N/A

PETITION FOR RELIEF

Petition for relief as approved by PPRB, PPRB minutes showing approval

Applicable: YES NO



Petition for Relief from Competitive Sealed Bidding Requirements

Miss. Code Ann. § 31-7-403 and § 31-7-413

PPRB OPSCR Rules and Regulations Sections 3-201, 3-203.01(g)(2), and 7-103

Agency: _____

Requested Date for PPRB Approval: _____

Procurement Method Requested: _____

Intended Initial Contract Term: _____

Intended Renewal Terms Available: _____

Number of Contracts Intended to be Awarded: _____

The Agency intends to solicit the following service(s) and/or scope of work:

As explained below, use of an Invitation for Bids is: **not practicable**
 not advantageous
 both

The Agency intends to use the following Evaluation Factors:

Is the Agency requesting to score Cost openly? Yes No
If yes, please provide an explanation:


Are these services currently being provided to the Agency? Yes No
If yes, who is currently providing the services?

Agency Representative for PPRB Meeting: _____

The Agency Representative will attend: In Person Remote

*The option to attend remotely is not available to Agencies located in Hinds, Rankin, or Madison counties.

By signing below, I certify that all information provided herein is true, correct, and complete to the best of my knowledge.

 _____ 11/6/2024
Chief Procurement Officer Date

Chief Procurement Officer Name: Monique Corley

Telephone Number: 601-359-2334 **Email Address:** mcorley@mdek12.org

The PPRB may modify or revoke its approval of the Petition for Relief at any time. The Board's approval must be "reviewed for current applicability from time to time." Miss. Code Ann. §31-7-403(4). Therefore, a solicitation cannot be issued from this Petition for Relief if the Board's approval occurred more than one year prior to the date the solicitation will be issued.



MEETING MINUTES
Wednesday, January 8, 2025
9:00 a.m.

Board Members: Norman Katool, Chair
Rita Wray
Norman McLeod
David Russell
Billy Morehead
Liz Welch

Staff Members: Brittney Thompson
Liz Bolin, General Counsel
Deanne Saltzman
Danny Lynch
Eryca Gilmore
Adrian Massey
Glenn Kornbrek
Kent Adams
Amelia Gamble
Brian Williams
Kimberly Burse
Chelsea Stewart
Shantina Christmas
Shannon Smith
Teselyn Funchess
Jay Woods
Angela Cooper
Gale Kornbrek

Staff Members Attending Via Teleconference:

Preston L. Pierce
Shakrita Fields
Demetra Hayes
Yolanda Thurman
Jonathon Dillard
Tiffany Frazier
Easter Haimur
LaShun Smith
Ashley Smith

James Brabston
Alicia Coleman
Niki Hobkirk

Guests Attending Via Teleconference:

Bob Ponder
Khairy Abu-Salah
Anderson Thomas
Aveleka Moore
Valeka Moore
Melanie Green
Kelly Breland
Candice Webster
Harris Vanbuskirk
Jeanette Crawford
Erika Andrews
Kevin Pearson
Mary Dukes
Amber Stuart
Crystal Henry
Bryan Wardlaw
John Show
Trent Jones
Lisa Wallace
Jay Rester
Caleb Alford
John Robinson
Kimberly Hendrix
Samuel Cole
Debra Rain
Brian Daniel
Marie Raines
Dorthy Young
Amber Fulton
Brian Ferguson
Kayla Mcknight
Sharon Clark
Lee Shirley
Eric Davis
Three (3) attendees were unidentified

I. Call to Order

The meeting was called to order by Norman Katool, Chair.

II. Approval of Minutes from the December 4, 2024 Public Procurement Review Board Meeting

Action: Mr. Morehead made a motion to approve the Minutes from December 4, 2024, PPRB Meeting as presented. The motion was seconded by Mr. Russell and unanimously approved by all members present.

III. Approval of per diem and expenses for the January 8, 2025 meeting and for any additional expenses incurred prior to the February 5, 2025 meeting

Action: A motion was made by Mr. McLeod to approve per diem and expenses for the January 8, 2024 meeting and for any additional expenses incurred prior to the February 5, 2025 meeting. The motion was seconded by Mr. Morehead and unanimously approved by all members present.

IV. Reports

A. OPTFM Emergency Purchases Reported to the Board

The OPTFM Emergency Purchases Report is attached to these Minutes as **Attachment A**.

B. OPTFM Sole Source Purchases Reported to the Board

The OPTFM Sole Source Approvals Report is attached to these Minutes as **Attachment B**.

C. OPTFM Staff Approvals Reported to the Board

The OPTFM Staff Approvals Report is attached to these Minutes as **Attachment C**.

D. BOB Staff Approvals Reported to the Board

The BOB Staff Approvals Report is attached to these Minutes as **Attachment D**.

E. OPSCR Emergency Contracts Reported to the Board

The OPSCR Emergency Contracts Report is attached to these Minutes as **Attachment E**.

F. OPSCR Sole Source Contracts Reported to the Board

The OPSCR Sole Source Contracts Report is attached to these Minutes as **Attachment F**.

G. OPSCR Staff Approvals Reported to the Board

The OPSCR Staff Approvals Report is attached to these Minutes as **Attachment G**.

V. DFA Office of Purchasing, Travel and Fleet Management (OPTFM)

A. Petition for Relief from Reverse Auction

- 1. Requesting Governing Authority:** MS Department of Wildlife, Fisheries, & Parks (MDWFP)
Suppliers: N/A

RFx #: 3180002480

Term: Up to 36 months

Total Value: \$1,600,000.00

Summary of Request: Mississippi Wildlife Fisheries & Parks is requesting an exemption from the reverse auction process for the purchase of up to thirty-six (36) tiny homes to be built across multiple state parks. MDWFP believes that a Request for Qualifications (RFQ) would be more advantageous and practical for them to seek qualified vendors.

Staff Recommendation: OPTFM recommends approval of this exemption.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. McLeod and unanimously approved by all members present.

2. Requesting Governing Authority: Cleveland School District

Supplier: Unknown

Term: One-time purchase

Total Value: \$150,000.00

Commodity: E-Rate Category 2 Project

Summary of Request: The Cleveland School District has requested an exemption from using the reverse auction process for the purchase of an E-Rate Category 2 project. E-Rate is the commonly used name for the Schools and Libraries Program of the Universal Service Fund, which is administered by the Universal Service Administrative Company (USAC) under the direction of the Federal Communications Commission (FCC). They are requesting an exemption due to the short application window and has determined that utilizing the sealed bid process would be in the best interest of the district and State.

Staff Recommendation: OPTFM recommends approval of this exemption.

Action: A motion was made by Mr. Russell to approve the staff recommendation as presented. The motion was seconded by Ms. Morehead and unanimously approved by all members present.

B. Consideration of State Agency Contracts for Board Action

1. Requesting Agency: Mississippi Department of Transportation (MDOT)

Supplier: Crown USA Inc, Ennis Flint, Inc, Geveko Markings, Inc., Preform LLC

Contract #: 8900002661, 8900002662, 8900002663, 8900002664

Term: 01/08/2025 through 12/31/2025

Total Value: \$975,000.00 (\$400,000.00, \$350,000.00, \$150,000.00, \$75,000.00)

Summary of Request: MDOT completed the competitive sealed bid process for pavement marking materials and awarded contracts based on the lowest bid per line item. These contracts have two (2) possible twelve (12) month extensions and will be used by state agencies and governing authorities.

Staff Recommendation: OPTFM recommends approval of this contract.

Action: A motion was made by Mr. McLeod to approve the staff recommendation as

presented. The motion was seconded by Mr. Morehead and unanimously approved by all members present.

2. Requesting Agency: Mississippi Department of Transportation (MDOT)

Supplier: Scott Equipment Company LLC

Contract #: 8200070610

Term: 02/01/2025 through 07/31/2025

Total Value: \$1,806,250.00

Summary of Request: MDOT is requesting approval to extend the contract for self-propelled power brooms with Scott Equipment. The original two extensions were approved by PPRB on 1/3/2024 and 7/3/2024. This is the third of nine (9) possible six (6) month extensions.

Staff Recommendation: OPTFM recommends approval of this extension.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. Russell and unanimously approved by all members present.

3. Requesting Agency: MS Forestry Commission (MFC)

Supplier: Puckett Machinery

Contract #: 8200078474

Term: 01/08/2025 through 11/21/2025

Total Value: \$ 2,718,000.00

Summary of Request: The Mississippi Forestry Commission conducted a reverse auction for the purchase of crawler tractors and wishes to award the contract to Puckett Machinery. MFC will purchase a minimum of four (4) tractors not to exceed a maximum of twelve (12).

Staff Recommendation: OPTFM recommends approval of this contract.

Action: A motion was made by Ms. Wray to approve the staff recommendation as presented. The motion was seconded by Mr. McLeod and unanimously approved by all members present.

VI. DFA Bureau of Building, Grounds and Real Property Management (BOB/RPM)

A. Consideration of Contracts for Project Professionals

1. Using Agency: Mississippi University for Women

Project Number: GS# 104-216

Project Title: Preplan Pohl Gymnasium Renovation

Location: Columbus, Mississippi

Budget: \$300,000.00

Funding Sources: H.B. 603, L'23

Professional Fee: D+ (estimated fees \$857,726.31)

Professional: Belinda Stewart Architects, PA (Eupora, Mississippi)

Scope: Preplanning through the Design Development Phase for the renovation of the Pohl Gym on the MUW main campus. This vacant 25,700 square foot facility has not seen any significant improvements or modifications since its construction in 1927. The scope will include a roof replacement, a complete exterior / interior renovation including some interior reconfiguration. This effort will also require asbestos abatement, ADA access improvements, and renovation of the mechanical, electrical, plumbing and life safety systems as per code requirements. This building is a Mississippi Landmark and will require coordination with MDAH.

Staff Recommendation: BOB recommends PPRB approval, contingent upon IHL approval and a fully executable Contract.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Ms. Wray and unanimously approved by all members present.

2. Using Agency: Mississippi University for Women

Project Number: GS# 104-217

Project Title: Preplan Hogarth Center Renovation

Location: Columbus, Mississippi

Budget: \$300,000.00

Funding Sources: H.B. 603, L'23

Professional Fee: C+ (estimated fees \$818,738.75)

Professional: Burris/ Wagnon Architects, P.A. (Jackson, Mississippi)

Scope: Preplanning through the Design Development Phase for the renovation of the Hogarth facility on the MUW main campus. This 41,000 square foot building has not seen any significant improvements or modifications since its construction in 1969. The scope will include roof replacement a complete interior renovation with some reconfiguration of spaces. This effort will also require asbestos abatement, ADA access improvements and renovation of the mechanical, electrical, plumbing and life safety systems as per code requirements.

Staff Recommendation: BOB recommends PPRB approval, contingent upon IHL approval and a fully executable Contract.

Action: A motion was made by Ms. Wray to approve the staff recommendation as presented. The motion was seconded by Mr. Morehead and unanimously approved by all members present.

3. Using Agency: Fair Commission

Project Number: GS# 343-128

Project Title: Preplan Security Improvements

Location: Jackson, Mississippi

Budget: \$500,000.00

Funding Sources: SB 2468, L'24 Capital Expense Funds

Professional Fee: C (estimated fees \$1,150,522.60)

Professional: Neel-Schaffer, Inc. - Jackson

Scope: Preplanning through Design Development Phase of campus security improvements at the Mississippi Fairgrounds in Jackson, Mississippi. The scope will include improvements to approximately 9,000 linear feet of perimeter fencing and gates, campus ingress and egress, vehicular and pedestrian circulation, camera systems, lighting, wayfinding, and construction of approximately 600 square feet of security station(s), including related modifications to paving, sidewalks and infrastructure. Project will include recently acquired Greymont Avenue properties.

Staff Recommendation: BOB recommends PPRB approval, contingent upon a fully executable Contract.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. Russell and unanimously approved by all members present.

B. Consideration of Construction Contract for Board Action

1. Using Agency: Mississippi Valley State University

Project Number: GS# 106-258

Project Title: Academic Skills TI

General Contractor: Thrash Commercial Contractors, Inc. (second low of 6 bidders. Low bidder was non-compliant.)

Construction Days from Notice to Proceed [Time]: 365 days

Total Value at Award: \$7,143,870.00 (Base Bid and 5 alternates)

Scope: Interior renovation of the 37,790 square foot Academic Skills facility located on the Mississippi Valley State University campus in Itta Bena, Mississippi.

Staff Recommendation: BOB recommends PPRB approval, contingent upon IHL approval and a fully executable Contract.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Ms. Wray and unanimously approved by all members present.

2. Using Agency: East Central Community College

Project Number: GS# 203-065

Project Title: New Cafeteria

General Contractor: Sullivan Enterprises, Inc.

Construction Days from Notice to Proceed [Time]: 420 days

Total Value at Award: \$9,860,000.00 (Base Bid only)

Scope: Construction through Warranty of a new cafeteria for the Decatur Campus of ECCC. Facility will include kitchen, dry goods and cold food storage, serving area, dining areas and incidental support spaces. This project will also include demolition and site preparation at the location proposed for a 14,770 square foot new cafeteria.

Staff Recommendation: BOB recommends PPRB approval, contingent upon additional funding and a fully executable Contract.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. Russell and unanimously approved by all members present.

3. Using Agency: Mississippi Department of Corrections

Project Number: GS# 320-094

Project Title: WGCF Cell Door System Replace

General Contractor: DC Services, LLC

Construction Days from Notice to Proceed [Time]: 426 days

Total Value at Award: \$7,916,000.00 (Base Bid and 2 alternates)

Scope: Construction through warranty for complete door control system replacement at Walnut Grove Correctional Facility. This includes all existing door control panels, wiring, Programmable Logic Controller, and required components and connections for the entire facility. Buildings 1 and 2 will have existing sliding cell doors changed to swinging doors and will also receive new surface mounted locks. Walnut Grove Correctional Facility is a 376,000 square foot facility.

Staff Recommendation: BOB recommends PPRB approval, contingent upon a fully executable Contract.

Action: A motion was made by Mr. McLeod to approve the staff recommendation as presented. The motion was seconded by Mr. Morehead and unanimously approved by all members present.

C. Consideration of “Agency” Construction Contract for Board Action

1. Using Agency: Mississippi Department of Environmental Quality

Project Title: Hancock County Marsh Living Shoreline Phase 6

General Contractor: TKTMJ, Inc. (Natchitoches, Louisiana)

Construction Days from Notice to Proceed [Term]: 6 months

Total Value at Award: \$13,999,500.00 (Base Bid)

Scope: The construction of a living shoreline and associated breakwater materials between Bayou Bolan and Bayou Caddy and consists of installing approximately 8,180 linear feet of stone breakwater.

Staff Recommendation: BOB recommends PPRB approval, contingent upon a fully executable Contract.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. MaLeod and unanimously approved by all members present.

D. RPM New Leases

1. Requesting Agency: Mississippi Division of Medicaid

Lease #: 515-253-40A

Lessor: Clinton, MS I SGF, LLC

Term: 05-01-2025 thru 04-30-2040

Total Space per Occupant: N/A

Federal Funds: 50%

Proposed Square Footage: 12,261

Address of Property: 500 Clinton Center Drive, Clinton, MS

Purpose of Lease: This office will serve western Hinds County for Medicaid.

Note: This is a 15-year lease with a 3% increase each year. Square footage cost are inclusive. There are two five-year options at the end of the 15-year period that will have to be approved by PPRB.

Year 1: **\$245,220.00** per Year which is based upon a rate of **\$20.00** per Rentable Square Foot

Year 2: **\$252,576.60** per Year which is based upon a rate of **\$20.60** per Rentable Square Foot

Year 3: **\$260,153.90** per Year which is based upon a rate of **\$21.22** per Rentable Square Foot

Year 4: **\$267,958.52** per Year which is based upon a rate of **\$21.85** per Rentable Square Foot

Year 5: **\$275,997.27** per Year which is based upon a rate of **\$22.51** per Rentable Square Foot

Year 6: **\$284,277.19** per Year which is based upon a rate of **\$23.19** per Rentable Square Foot

Year 7: **\$292,805.51** per Year which is based upon a rate of **\$23.88** per Rentable Square Foot

Year 8: **\$301,589.67** per Year which is based upon a rate of **\$24.60** per Rentable Square Foot

Year 9: **\$310,637.36** per Year which is based upon a rate of **\$25.34** per Rentable Square Foot

Year 10: **\$319,956.48** per Year which is based upon a rate of **\$26.10** per Rentable Square Foot

Year 11: **\$329,555.18** per Year which is based upon a rate of **\$26.88** per Rentable Square Foot

Year 12: **\$339,441.83** per Year which is based upon a rate of **\$27.68** per Rentable Square Foot

Year 13: **\$349,625.09** per Year which is based upon a rate of **\$28.52** per Rentable Square Foot

Year 14: **\$360,113.84** per Year which is based upon a rate of **\$29.37** per Rentable Square Foot

Year 15: **\$370,917.25** per Year which is based upon a rate of **\$30.25** per Rentable Square Foot

Staff Recommendation: RPM recommends the approval of this lease.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. Mcleod and unanimously approved by all members present.

E. RPM Succeeding Leases

Items VI.E.1. through VI.E.4. were presented together and voted together.

1. Requesting Agency: Mississippi Division of Medicaid

Lease #: 515-821-30A

Lessor: Mega Properties Yazoo, LLC

Term: 02-01-2025 thru 01-31-2030

Total Yearly Cost: \$63,000.00

Cost PSF: \$9.00 + Utilities & Janitorial

Previous Cost PSF: \$9.00 + Utilities & Janitorial

Total Space per Occupant: N/A

Federal Funds: 50%

Proposed Square Footage: 7,000

Address of Property: 110 Jerry Clower Blvd., Yazoo City, MS

Purpose of Lease: This is a regional office that serves Yazoo, Humphrey and Holmes Counties.

Note: This is a five (5) year succeeding lease with no renewals. The Agency has been at this location since 02-01-2015.

Staff Recommendation: RPM recommends approval of this lease.

2. Requesting Agency: Mississippi Division of Medicaid

Lease #: 515-011-27A

Lessor: Stahlman Properties, LP

Term: 03-01-2025 thru 02-28-2027

Total Yearly Cost: \$102,741.60

Cost PSF: \$15.60 + Utilities & Janitorial

Previous Cost PSF: \$12.50 + Utilities & Janitorial

Total Space per Occupant: N/A

Federal Funds: 50%

Proposed Square Footage: 6,586

Address of Property: 103 State Street, Natchez, MS

Purpose of Lease: This is a regional office that serves Adams, Franklin, Jefferson and Wilkerson counties.

Note: This is a two (2) year succeeding lease with no renewals. The agency has been at this location since 03-01-2015.

Staff Recommendation: RPM recommends approval of this lease.

3. Requesting Agency: Mississippi Division of Medicaid

Lease #: 515-461-30A

Lessor: Columbia Commons, LLC

Term: 03-01-2025 thru 02-08-2030

Total Yearly Cost: \$72,000.00

Cost PSF: \$10.00 + Utilities & Janitorial

Previous Cost PSF: \$10.00 + Utilities & Janitorial

Total Space per Occupant: N/A

Federal Funds: 50%

Proposed Square Footage: 7,200

Address of Property: 501 Eagle Day Avenue, Columbia, MS

Purpose of Lease: This is a regional office that serves Marion, Jefferson Davis and Covington counties.

Note: This is a five (5) year succeeding lease with no renewals.

Staff Recommendation: RPM recommends approval of this lease.

4. Requesting Agency: Mississippi Division of Medicaid

Lease #: 515-612-30A

Lessor: Allread Investments, LLC

Term: 03-01-2025 thru 02-28-2030

Total Yearly Cost: \$133,000.00

Cost PSF: \$14.00 + Utilities & Janitorial

Previous Cost PSF: \$10.71 + Utilities & Janitorial

Total Space per Occupant: N/A

Federal Funds: 50%

Proposed Square Footage: 9,500

Address of Property: 3035 Greenfield Road, Pearl, MS

Purpose of Lease: This is a regional office that serves Rankin, Simpson and Smith counties.

Note: This is a five (5) year succeeding lease with no renewals. This agency has been at this location since 03-01-2015.

Staff Recommendation: RPM recommends approval of this lease.

Action: A motion was made by Ms. Wray to approve the staff recommendation as presented on Items VI.E.1. through VI.E.4. The motion was seconded by Mr. Morehead and unanimously approved by all members present.

F. RPM Amended Leases

1. Requesting Agency: Mississippi Department of Rehabilitation Services

Lease #: 725-243-26C

Lessor: Long Beach Station, LLC

Term: 02-01-2025 thru 01-31-2026

Total Yearly Cost: \$12,000.00

Previous Yearly Cost: \$10,800.00

Cost PSF: \$16.44 + Utilities & Janitorial

Previous Cost PSF: \$14.79 + Utilities & Janitorial

Total Space per Occupant: N/A

Square Footage Proposed: 730

Federal Funds: 80%

Address of Property: 210 Second Avenue, Long Beach, MS

Purpose of Lease: MDRS blind clients will be living in the apartment as part of a residential training model. Living in the community is a key component of the learning experience. This training will offer daily tasks of cooking, washing, cleaning, etc., which the blind consumer will perform independently after they have received the proper training from the training center. The client will be responsible for fulfilling these daily tasks in the apartment; however, an apartment manager (MDRS Instructor) will ensure that these tasks are being completed at the apartment.

Note: This is a one-year lease with no renewals. Agency has been at this location since 11-01-2023.

Staff Recommendation: RPM recommends approval of this lease.

Action: A motion was made by Ms. Wray to approve the staff recommendation as presented. The motion was seconded by Mr. Morehead and unanimously approved by all members present.

G. RPM Non-Competitive Leases

1. Requesting Agency: Mississippi Forestry Commission

Lease #: 330-344-26A

Lessor: Pine Belt Regional Airport/AV Flight Hattiesburg Corp

Term: 01-08-2025 thru 01-07-2026

Total Yearly Cost: \$2,472.00

Cost PSF: \$2.47 Inclusive

Total Space per Occupant: N/A

Federal Funds: 0%

Proposed Square Footage: 1,000

Address of Property: Pine Belt Regional Airport, Moselle, MS

Purpose of Lease: This lease is for the storage of Forestry's aircraft.

Note: This is a one-year lease with no renewals.

Staff Recommendation: RPM recommends the approval of this lease.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. McLeod and unanimously approved by all members present.

2. Requesting Agency: Mississippi Department of Human Services

Lease #: 865-221-30A

Lessor: Grenada County Board of Supervisors

Term: 02-01-2025 thru 01-31-2030

Total Yearly Cost: \$72,000.00

Cost PSF: \$16.17 + Utilities & Janitorial

Total Space per Occupant: N/A

Federal Funds: 100%

Proposed Square Footage: 4,452

Address of Property: 1241 Fairground Rd., Ste B. Grenada, MS

Purpose of Lease: This is the county office for MDHS.

Note: This is a five-year lease with no options to renew. This lease may change yearly with the number of assigned employees in this location. A review will be conducted every year to assess the federal share of the lease reimbursement.

Staff Recommendation: RPM recommends the approval of this lease.

Action: A motion was made by Mr. McLeod to approve the staff recommendation as presented. The motion was seconded by Ms. Wray and unanimously approved by all members present.

H. Parchman Farming Lease Renewals

Quitman County

Tract	Lessee	Acres	Lease Amount	Year
1	Kellen Corbin	141.16	\$11,330.00	6/8

Sunflower County

Tract	Lessee	Acres	Lease Amount	Year
1	Josh Chandler	165.08	\$19,149.28	6/8
2/39	Roosevelt Jones	638.39	\$57,455.10	6/8
3	Wesley Chandler	469.66	\$61,000.00	6/8
4 fields 1,				

2,3,11,19	William Livingston	326.78	\$25,227.42	7/8
5	C & B Farms	329.00	\$41,500.00	5/8
10	C & B Farms	397.09	\$42,150.00	5/8
11	C & B Farms	429.00	\$45,650.00	5/8
12	C & B Farms	354.68	\$65,000.00	4/8
13	C & B Farms	335.83	\$61,510.00	4/8
14	C & B Farms	480.67	\$51,050.00	4/8
15	Gumbo Brothers	327.58	\$65,843.58	2/8
16	C & B Farms	295.17	\$31,550.00	4/8
18	Marcus Johnson	400.19	\$40,019.00	4/8
	Farms and Trucking			
19	C & B Farms	500.58	\$91,600.00	4/8
20	C & B Farms	278.69	\$51,200.00	4/8
21	C & B Farms	254.87	\$33,300.00	4/8
22	C & B Farms	328.40	\$28,229.26	6/8
23	C & B Farms	296.84	\$32,050.00	5/8
24	Gumbo Brothers	101.51	\$15,297.55	2/8
25	C & B Farms	369.00	\$40,150.00	5/8
30	C & B Farms	436.17	\$40,616.15	7/8
31	C & B Farms	440.56	\$42,734.00	7/8
36	C & B Farms	213.54	\$39,100.00	4/8

Note: This request is based on recommendations from the Mississippi Department of Corrections, Mississippi State Penitentiary at Parchman, MS., and the Division of Agricultural Enterprises. MDOC requests PPRB approve these farmland lease renewals listed above. This request is also contingent upon the execution of the farming lease contracts.

Staff Recommendation: RPM recommends the approval of these farmland lease renewals.

Action: A motion was made by Ms. Wray to approve the staff recommendation as presented. The motion was seconded by Mr. Morehead and unanimously approved by all members present.

I. Parchman Farmland Assignments

Consider a request from Mississippi Department of Corrections to assign/sub-lease approximately 326.78 acres of tracts 4 (fields 1, 2, 3, 8, 11, & 19 11) located in the Mississippi State Penitentiary Farmland in Sunflower County, Mississippi from William E. Livingston to Joshua Chandler for the 2025 crop year per paragraph 18 of the original lease regarding assignments. All terms and conditions, including the yearly rental amounts per acre will remain the same as in the original lease between the Lessee and the State of Mississippi. The Lessee and Assignee will both be responsible for the tract(s) until expiration of the lease term which is January 14th, 2026. Should PPRB decide not to approve the Assignment/Sub-Lease, the Lessee will retain the tract(s) completely. The total yearly amount of the assigned leases is \$25,227.42.

Staff Recommendation: RPM recommends the approval of this assignment and is contingent on receiving an executed assignment contract.

Action: A motion was made by Mr. Morehead to approve the staff recommendation as amended. The motion was seconded by Mr. McLeod and unanimously approved by all members present.

VII. DFA Office of Personal Service Contract Review (OPSCR)

A. Consideration of Contracts for Board Action

1. **Requesting Agency:** Mississippi Department of Mental Health

Supplier: Health Management Associates, Inc.

Contract #: 8200078569

Term: 01/09/2025 - 07/08/2026

Total Value: \$353,493.00

New

\$353,493.00

Summary of Request: The term of the contract is 18 months with no optional renewal. The Contractor will provide 988 Crisis Training Consultant Services. The Contractor was selected through a Request for Proposals (RFP) with five respondents, four of which were deemed non-responsive and/or non-responsible. The Contract was awarded to the only responsive and responsible respondent.

Staff Recommendation: OPSCR recommends approval of this request.

Projected Budget for the Life of the Contract: \$353,493.00 (18 months with no renewals)

Current Contractor: N/A

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. Russell and unanimously approved by all members present.

2. **Requesting Agency:** Mississippi Department of Public Safety

Supplier: National Medical Services, Inc.

Contract #: 8200078540

Term: 01/08/2025 – 01/07/2026

Total Value: \$432,920.00

New

\$432,920.00

Summary of Request: The term of the contract is one year with four optional one-year renewals. The Contractor will provide testing and reporting services for drug testing marijuana/hemp determination, differentiation, and controlled substance identification. The Contractor was selected through an Invitation for Bids as the only respondent. The Agency requests an exception to PPRB OPSCR Rules and Regulations effective September 6, 2024, because it used the previous version of the rules for this solicitation. OPSCR has reviewed the request and has no concerns that granting the exception would affect the competition, fairness, or transparency of the procurement as the agency fully complied with the requirements in the previous version of the rules.

Staff Recommendation: OPSCR recommends approval of this request, contingent upon the exception request being granted.

Projected Budget for the Life of the Contract: \$2,164,500.00 (one year with four one-year renewals)

Current Contractor: N/A

Action: A motion was made by Ms. Wray to approve the staff recommendation as presented. The motion was seconded by Mr. Morehead and unanimously approved by all members present.

3. Requesting Agency: Mississippi Development Authority

Supplier: Mississippi State University

Contract #: 8200078360

Term: 01/08/2025 – 06/30/2027

Total Value: \$312,939.00

**New
\$312,939.00**

Summary of Request: The term of the contract is two years and six months. The Contractor will provide continued delivery of the ASPIRE program, which is to enhance the economic development capacity in select counties by supporting local development and facilitating greater access to MDA resources. Pursuant to Miss. Code Ann. § 27-104-7(2)(i), agencies under the purview of the PPRB may contract with Government Entities not under the purview of the PPRB, without bidding or other solicitation. The Agency has determined the price represents a fair market value for this service.

Staff Recommendation: OPSCR recommends approval of this request.

Projected Budget for the Life of the Contract: \$312,939.00 (two years and six months with no renewals)

Current Contractor: Mississippi State University – Stennis Institute of Government and Community Development

Action: A motion was made by Mr. Morehead to approve the staff recommendation as presented. The motion was seconded by Mr. Russell and unanimously approved by all members present.

4. Requesting Agency: Mississippi Department of Environmental Quality

Supplier: Efficient Power & Light, LLC dba EPL Advisors, LLC

Contract #: 8200077557

Term: 01/08/2025 – 12/30/2027

Total Value: \$240,000.00

**New
\$240,000.00**

Summary of Request: The term of the contract is approximately three years with two optional one-year renewals. The Contractor will provide professional engineering and technical support services including administrative, logistical, information transfer, and operational support for MDEQ's Pollution Prevention Program and enHance Voluntary

Stewardship Program. The Contractor was selected through a Request for Qualifications (RFQ) with one Respondent and contract was awarded to the sole respondent.

Staff Recommendation: OPSCR recommends approval of this request.

Projected Budget for the Life of the Contract: \$400,000.00 (three years with two one-year renewals)

Current Contractor: Mississippi Manufacturers Association – Extension Partnership

Action: A motion was made by Mr. Russell to approve the staff recommendation as presented. The motion was seconded by Mr. Morehead and unanimously approved by all members present.


I. Other Business

A. Mr. Katool announced the next Regular PPRB Meeting February 5, 2025 at 9:00 a.m.

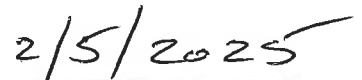
II. Adjournment

Action: A motion was made by Mr. Russell to adjourn. The motion was seconded by Mr. McLeod and unanimously approved by all members present.

These Minutes of the Public Procurement Review Board were approved by the members on the 5th of February 2024.



Norman Katool, Chair



Date

Attachment A

OPTFM

Emergency Purchases Report

Calendar Year 2024 Total (to date):

\$17,507,170.91

Emergency Contracts Reported January 8, 2025							
Contract #	Agency	Contractor	Commodity	Action	Amount	Start	End
8400003180	MS DEPT OF CORRECTIONS	SEQUEL ELECTRICAL SUPPLY, LLC	PRIMARY ELECTRICAL WIRE NEEDED FOR CMCF EMERGENCY TO COMPLETE REPAIRS TO THE UNDERGROUND LOOP SYSTEM.	NEW	\$94,602.28	11/19/2024	11/18/2025
Total for Report					\$94,602.28		

Attachment B

OPTFM

Sole Source Approvals

Calendar Year 2024 Total (to date):

\$12,124,776.80

SOLE SOURCE Contracts Reported January, 8 2025

Contract #	Agency	Vendor	Action	Commodity	Amount	Start Date	End Date
8800009686	UMMC	VIRTAMED INC	NEW	ORTHOPEDIC SIMULATOR	\$220,000.00	12/10/2024	12/9/2025
8800009691	MS STATE UNIVERSITY	TEXTURE TECHNOLOGIES CORP	NEW	TA.XTPLUSC TEXTURE ANALYZER	\$32,632.00	12/9/2024	12/8/2025
8800009684	MS DEPT OF HEALTH	CRIBS FOR KIDS, INC.	NEW	160 SAFE SLEEP SURVIVAL SSS PRE-PACKED FROM CRIBS FOR KIDS.	\$22,400.00	12/9/2024	12/8/2025
8800009685	UMMC	SCIREQ SCIENTIFIC RESPIRATORY EQUIPMENT	NEW	RODENT INHALATION SYSTEM	\$80,582.85	12/9/2024	12/8/2025
8800009683	MS DEPT OF HEALTH	ILLUMINA INC	NEW	KITS AND REAGENTS TO PERFORM WGS (WHOLE GENOME SEQUENCING).	\$475,942.60	12/5/2024	12/4/2025
8800009680	MS STATE UNIVERSITY	CHICOT IRRIGATION INC	NEW	10 EACH, 5 HP ELECTRIC TAILWATER RECIRCULATING RICE PUMPS	\$298,696.00	12/2/2024	12/1/2025
8800009681	MS STATE UNIVERSITY	SIVAD INC	NEW	2 OTTO 100 AUTONOMOUS MOBILE ROBOTS AND 1 OTTO 750 AUTONOMOUS MOBILE ROBOT APPLICATION	\$242,460.59	12/2/2024	12/1/2025
Total Reported in December 2024:					\$1,372,714.04		

SOLE SOURCE Contracts Reported FEBRUARY 7, 2024

Contract #	Agency	Vendor	Action	Commodity	Amount	Start Date	End Date
8800009242	MS STATE UNIVERSITY	LI-COR, INC.	NEW	EDDY FLUX SYSTEM	\$277,921.20	1/11/2024	1/9/2025
8800009241	MS STATE UNIVERSITY	WORLDWIDE EXCHANGE LLC	NEW	SPECTROPHOTOMETER	\$18,105.56	1/10/2024	1/8/2025
8800009240	UNIVERSITY OF MS	NIKON INSTRUMENTS INC	NEW	MICROSCOPE	\$213,329.20	1/8/2024	1/6/2025
8800009229	DEPT OF PUBLIC SAFETY	CMI, INC	NEW	INTOXILYZER 8000 PARTS	\$210,000.00	1/8/2024	1/7/2025
8800009225	MS STATE UNIVERSITY	POLYTEC, INC.	NEW	LASER SCANNING VIBROMETER	\$167,000.00	1/4/2024	1/2/2025
8800009233	MS STATE UNIVERSITY	LI-COR, INC.	NEW	POROMETER/FLUOROMETER	\$14,125.00	1/3/2024	1/1/2025
8800009224	MS STATE UNIVERSITY	INTERNATIONAL ASSOCIATION OF ASSEMBLY OFFICERS	NEW	COURSE MATERIALS	\$99,750.00	1/3/2024	1/1/2025
8800009201	JACKSON STATE UNIVERSITY	HQ GRAPHENE SYATEMS BV	NEW	MOTORIZED TRANSFER SYSTEM	\$68,097.25	11/15/2022	12/30/2023
Total Reported in January 2024:					\$858,328.21		

Attachment C

OPTFM

Staff Approvals

**Public Procurement Review Board
OPTFM Staff Approvals**

January-25

Contract #	Agency	Contractor	Commodity	Action	Amount	Staff Approval Type	Staff Approval Authority
8200078427	MS FORESTRY COMMISSION	WARREN LLC	TWELVE (12) DOZER TRANSPORT TRUCK BEDS	NEW	\$480,000.00	COMPETITIVE BID	UNDER THE \$500,000.01 THRESHOLD
8200078276	MS WILDLIFE FISHERIES & PARK	AMERICAN AIRBOAT CORP.	AIRBOAT	MODIFICATION	\$201,000.00	COMPETITIVE BID	UNDER THE \$500,000.01 THRESHOLD
8200054634	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$13,133.44	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078295	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$4,796.16	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200054763	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$4,974.64	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078294	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078304	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078307	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$4,796.16	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078286	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078296	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$15,540.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200053586	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$27,571.68	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200059740	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$15,568.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200054637	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$19,748.16	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200059635	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$32,144.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200065757	MS DEPT OF HUMAN SERVICES	TOSHIBA BUSINESS SOLUTIONS	COPIER RENTAL	MODIFICATION	\$262,216.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200060354	MS DEPT OF HUMAN SERVICES	TOSHIBA BUSINESS SOLUTIONS	COPIER RENTAL	MODIFICATION	\$263,832.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200061045	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$23,044.80	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200062376	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$7,560.96	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078466	MS DEPT OF HUMAN SERVICES	TOSHIBA BUSINESS SOLUTIONS	COPIER RENTAL	NEW	\$231,912.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200062829	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$23,530.24	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200071344	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$23,920.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
4600003401	MS MILITARY DEPT.	THE MERCHANTS COMPANY	FOOD FOR THE YOUTH CHALLENGE PROGRAM	NEW	\$100,000.00	OPEN PURCHASE ORDER	UNDER THE \$500,000.01 THRESHOLD
8200078492	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$13,156.80	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078579	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	NEW	\$12,056.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078327	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$4,796.16	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078326	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078325	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078322	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$15,540.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078321	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$15,540.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078320	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078309	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078308	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$15,540.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078297	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078295	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$4,796.16	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD

8200078286	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$9,864.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078269	ELLISVILLE STATE SCHOOL	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$21,354.24	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078745	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	NEW	\$12,056.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078746	MS DEPT OF HEALTH	CANON U.S.A., INC.	COPIER RENTAL	NEW	\$12,056.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078727	MS STATE UNIVERSITY	LI-COR INC	CHAMBER-BASED TRACE GAS ANALYSIS EQUIPMENT	NEW	\$109,929.00	COMPETITIVE BID	UNDER THE \$500,000.01 THRESHOLD
8200072085	MS DEPT OF CHILD PROTECTION	WEST PUBLISHING CORP	LEGAL RESEARCH	MODIFICATION	\$197,773.58	COMPETITIVE	UNDER THE \$500,000.01 THRESHOLD
4600003403	MS DEPT OF PUBIC SAFETY	JACKSON MAC HAIK CDJR, LTD	AUTOMOBILE PARTS AND SERVICES	NEW	\$2,500.00	OPEN PO	UNDER THE \$500,000.01 THRESHOLD
8200078383	UNIVERSITY OF SOUTHERN MS	TA INSTRUMENTS LLC	DIFFERENTIAL SCANNING CABRIMETRY	NEW	\$102,838.75	OREQ	UNDER THE \$500,000.01 THRESHOLD
4600003410	MS DEPT OF PUBIC SAFETY	CENTRAL MISS AUTO PARTS	AUTOMOBILE PARTS AND SERVICES	NEW	\$5,000.00	OPEN PO	UNDER THE \$500,000.01 THRESHOLD
4600003420	MS DEPT OF PUBIC SAFETY	JACKSON MAC HAIK CDJR, LTD	AUTOMOBILE PARTS AND SERVICES	NEW	\$5,000.00	OPEN PO	UNDER THE \$500,000.01 THRESHOLD
8200078384	UNIVERSITY OF SOUTHERN MS	TA INSTRUMENTS LLC	THERMOGRAPHIC ANALYSIS	NEW	\$78,100.00	OREQ	UNDER THE \$500,000.01 THRESHOLD
8200064395	MS DEPT OF TRANSPORTATION	ENNIS-FLINT INC	TRAFFIC-PAINT	MODIFICATION	\$320,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002151	MS DEPT OF TRANSPORTATION	FEDERAL SIGNAL CORP	VEHICLE SAFETY LIGHTNING	MODIFICATION	\$100,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002153	MS DEPT OF TRANSPORTATION	SOUTHERN TIRE MART LLC	VEHICLE SAFETY LIGHTNING	MODIFICATION	\$85,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002266	MS DEPT OF TRANSPORTATION	TRAXPLUS LLC	EQUIPMENT RENTAL	MODIFICATION	\$430,000.00	COMPETITIVE PURCHASING AGREEMENT	INDEFINITE QUANTITY
8200078705	MS DEPT OF TRANSPORTATION	CANON U.S.A., INC.	COPIER RENTAL	NEW	\$14,903.90	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200078375	MS DEPT OF TRANSPORTATION	CANON U.S.A., INC.	COPIER RENTAL	NEW	\$15,871.20	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200069184	MS DEPT OF TRANSPORTATION	CANON U.S.A., INC.	COPIER RENTAL	MODIFICATION	\$10,902.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200059735	MS DEPT OF TRANSPORTATION	RICHOH USA INC	COPIER RENTAL	MODIFICATION	\$4,359.74	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8200077221	MS DEPT OF TRANSPORTATION	PUCKETT- RENTS	COMPACT TRACK LOADER	MODIFICATION	\$2,575,759.50	COMPETITIVE PURCHASING AGREEMENT	OVER THE \$500,000.01 THRESHOLD
8900002600	MS DEPT OF TRANSPORTATION	MARTIN KELLY S	SAND AND GRAVEL	MODIFICATION	\$55,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002605	MS DEPT OF TRANSPORTATION	NUNLEY TRUCKING CO INC	SAND AND GRAVEL	MODIFICATION	\$25,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002604	MS DEPT OF TRANSPORTATION	DICKERSON AND BOWEN INC	SAND AND GRAVEL	MODIFICATION	\$30,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002591	MS DEPT OF TRANSPORTATION	4W FARMS INC	SAND AND GRAVEL	MODIFICATION	\$85,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002602	MS DEPT OF TRANSPORTATION	EVANS SAND AND GRAVEL INC	SAND AND GRAVEL	MODIFICATION	\$35,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002580	MS DEPT OF TRANSPORTATION	ORION SOLUTIONS	HERBICIDES	MODIFICATION	\$650,000.00	COMPETITIVE PURCHASING AGREEMENT	OVER THE \$500,000.01 THRESHOLD
8900002581	MS DEPT OF TRANSPORTATION	VM DISTRIBUTION	HERBICIDES	MODIFICATION	\$525,000.00	COMPETITIVE PURCHASING AGREEMENT	OVER THE \$500,000.01 THRESHOLD
8900002582	MS DEPT OF TRANSPORTATION	HELENA AGRI-ENTERPRISES	HERBICIDES	MODIFICATION	\$475,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002583	MS DEPT OF TRANSPORTATION	NUTRIEN AG SOLUTIONS	HERBICIDES	MODIFICATION	\$525,000.00	COMPETITIVE PURCHASING AGREEMENT	OVER THE \$500,000.01 THRESHOLD
8900002584	MS DEPT OF TRANSPORTATION	AZELIS US HOLDINGS	HERBICIDES	MODIFICATION	\$325,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002585	MS DEPT OF TRANSPORTATION	SYNERGY PARTNERS	HERBICIDES	MODIFICATION	\$450,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002652	MS DEPT OF TRANSPORTATION	THERMOPLASTICS	INGEVITY CORPORATION	NEW	\$150,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002651	MS DEPT OF TRANSPORTATION	THERMOPLASTICS	ENNIS-FLINT	NEW	\$75,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002650	MS DEPT OF TRANSPORTATION	THERMOPLASTICS	CROWN USA	NEW	\$150,000.00	COMPETITIVE PURCHASING AGREEMENT	UNDER THE \$500,000.01 THRESHOLD
8900002270	MS DEPT OF TRANSPORTATION	PUCKETT- RENTS	EQUIPMENT RENTAL	MODIFICATION	\$1,000,000.00	COMPETITIVE PURCHASING AGREEMENT	INDEFINITE QUANTITY
Total Report					\$10,583,893.27		

Attachment D

BOB

Staff Approvals

27-104-7 (2) The Public Procurement Review Board shall have the following powers and responsibilities: . . . (b) Adopt regulations governing the approval of contracts let for the construction and maintenance of state buildings and other state facilities as well as related contracts for architectural and engineering services. . . .

PPRB has set construction procedures requiring PPRB approval for (1) Professional Services and/or Planning Information when fees are over \$250,000.00; (2) Construction Contracts over \$5,000,000.00; (3) Furniture and Equipment Contracts over \$2,000,000.00; and (4) Change Orders over \$1,000,000 and/or over 25% of initial contract amount and/or when taking awards over \$5,000,000.00.

All other Standard Operating Procedures have been delegated to the Bureau of Building Director and/or DFA Deputy Executive Director, thereby creating the following list of Staff Approvals, per PPRB request to keep them informed.

BoB-AD-080 - Staff Approvals - GC

PPRB - December 16, 2024

11/21/2024 to 12/16/2024

Setup Name	Project Name	Institution/Agency Name	Contract Scope	Bid Clarification	Low Base Bid?	# Bids	# Bids / Quotes	Award Number	Company Name	Dir. Approval Date	Amount	Duration
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Staff Approvals - GC

Bid Award - GC

Total Count 0

\$0.00

10/19/2024 -11/20/2024

Project Name	Institution/Agency Name	Professional Scope of Work	Award Number	Company Name	Dir. Approval Date	Selection Method	Fee Complexity	Fee Percentage
331-186 New Dist 5 Hwy Patrol Substation	Department of Public Safety	Commissioning of total envelope and MEP of the EMER GC002 award	CP002	Sanders Engineering Inc.	11/22/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFx)	D (Cx)	
362-067 JOC General R&R	Woolfolk Building (Office of Capitol Facilities) (Department of Finance and Administration)	Design through construction for the 14th floor renovations.	JP014	The Johnson-McAdams Firm, P.A., dba Albert & Robinson Architects, PLLC	12/04/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFx)		Special Percentage (10%)
377-005 JOC-General R&R	Stennis Space Center (Office of Capitol Facilities) (Department of Finance and Administration)	Design through construction for repair of existing sprinkler pipes.	JP004	Allred Stolarski Architects, PA	12/11/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFx)		Special Percentage (9%)
104-219 JOC - MSMS General R&R	Mississippi University for Women	Planning through warranty for MSMS AHU replacement at Hooper Science Building.	JP001	Dewberry Engineers, Inc. (Virginia through the Office listed herein)	12/03/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFx)		Special Percentage (9%)
390-018 JOC - General R&R	Department of Finance and Administration	The planning through warranty phases for infrastructure improvements on Druid Hill Drive.	JP002	Neel-Schaffer, Inc. - Jackson (Jackson, Mississippi, through the Office listed herein)	12/13/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFx)		Special Percentage (9%)
427-016 Westway CSU Re-Roof	South Mississippi State Hospital (EMSH)	Design through warranty for the re-roofing of the Westway Crisis Stabilization Unit in Laurel, MS.	JP001	Allred Stolarski Architects, PA	12/09/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFx)		Special Percentage (9%)
351-013 JOC General R&R	Capers Building (Office of Capitol Facilities) (Department of Finance and Administration)	Design through construction for repairs at Capers Building, per a field study.	JP002	Shafer-Zahner-Zahner, PLLC	11/22/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFx)		Special Percentage (10%)
114-033 Executive Education Center	University of Southern Mississippi - Gulf Park Campus	Planning through warranty phase of a project to perform renovation and expansion of and upgrades, improvements and additions to a 55,346 square foot of Bldg. 952, Hardy Hall, to house the Executive Education Center and related facilities on the USM Gulf Park Campus.	JP001	Eley Guild Hardy Architects, PA (Biloxi, Mississippi)	11/25/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFx)		Special Percentage (10%)

207-061 Student Services Renovation - Tupelo Campus	Itawamba Community College	Renovations at the ICC Student Services building to house a Fitness Center, Police Station, Call Center, and TIS support center. It includes renovating the old book store and building lobby into a welcoming environment and new campus fitness center. The lobby will be designed to accommodate a variety of furniture options, vending machines, and touch down spaces. The fitness center will be designed to accommodate cardio machines, weight training machines, weight training free weights, and an aerobics room. Patron showers and lockers will be added	PP001	CDFL Architects + Engineers PA	12/11/2024	Professional appointed as a continuation of previous RFQ selection (Competitive RFX)	C+
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Count 9

BoB-AD-080: Staff Approvals - F&E

PPRB - December 16, 2024

Bid and Quote Awards / Amount:
between 0 to 2999999
11/21/2024 to 12/16/2024

Setup Name	Project Name	Institution/Agency Name	Contract Scope	Low Base Bid?	# Quote	Award Number	State Contract #	Company Name	Dir. Approval Date	Amount
Quote Award - FE	350-040 Furniture & Equipment FY'25	Office of Capitol Facilities (Department of Finance and Administration)	Procurement, delivery and installation of Cubicles for the 3rd Floor of the Woolfolk Building 501 N West Street, Jackson, Mississippi 39201. State Contract #8200077803.	Yes	1	FE002	8200077803	Office Innovations, Inc.	12/11/2024	\$225,221.00
	350-040 Furniture & Equipment FY'25	Office of Capitol Facilities (Department of Finance and Administration)	Procurement, delivery and installation on 29 Chairs for the 3rd Floor Woolfolk Building, 501 N. West Street, Jackson, Mississippi 39201. State Contract #8200074875.	Yes	1	FE003	8200074875	Office Innovations, Inc.	12/11/2024	\$18,310.60
	350-040 Furniture & Equipment FY'25	Office of Capitol Facilities (Department of Finance and Administration)	Procurement, delivery and installation of 13 Chairs for MMRS on the 12th floor of the Woolfolk Building, 501 N. West Street, Jackson, Mississippi 39201. State Contract #8200074875.	Yes	1	FE006	8200074875	Office Innovations, Inc.	12/11/2024	\$8,208.20
	362-067 JOC General R&R	Woolfolk Building (Office of Capitol Facilities) (Department of Finance and Administration)	Procurement, delivery and installation of Desks, Credenza, Guest Chairs for MMRS at the Woolfolk Building, 501 N West Street, 3rd and 7th Floor, Jackson MS 39201. State Contract #8200074562.	Yes	1	FE038	8200074562	Office Innovations, Inc.	12/04/2024	\$79,807.20
	383-002 Facility Improvements – PH 2	350 High Street (Office of Capitol Facilities) (Department of Finance and Administration)	Procurement, delivery and installation of a Desk for the Capitol Police Station at 350 High Street, Jackson, Mississippi 39202 State Contract #8200074562.	Yes	1	FE008	8200074562	Office Innovations, Inc.	11/21/2024	\$2,180.22
Quote Award - FE										\$333,727.22

Count: 5

Total:

\$333,727.22

Count: 5

BoB-AD-080: Staff Approvals - MAGIC

PPRB December 16, 2024

11/21/2024 -12/16/2024

Agency Description	CTR ID	Contract Description	Valid From	Valid To	Total Amt	Vendor Name	Material/Service Type	Appr/Rej Date	Appr Text
MS DEPT OF PUBLIC SAFETY	8200045200	1711-19-C-CNTR-00054-V004	8/1/2019	10/31/2025	259,200.00	J A V INC	LEASES	12/16/2024	Please put the lease number in the contract name area for reference (KA582995 08/06/2020 09:11:56 CST)
IS DEPT ENVIRONMENTAL QUALIT	8200067476	1470-23-C-CNTR-00010-V004	7/24/2023	5/29/2025	5,242,551.60	Breakwater Marine Construction, LLC	CONSTRUCTION - OTHER	11/22/2024	attachment of executed CO#3 (AM580363 11/22/2024 10:33:08 CST) approval of CO#3 Nov 6, 2024 PPRB (AM580363 11/07/2024 16:13:35 CST)
MS DEPT OF ARCHIVES & HISTORY	8200073527	1475-24-C-CNTR-00009	1/22/2024	12/31/9999	209,956.87	CDFL Architects + Engineers PA	ARCHITECTS	12/9/2024	approval of amendment number 1 dated 12-3-24, increasing overall project budget from \$1,500,000 to \$3,255,650 (AM580363 12/09/2024 11:24:45 CST)
MS DEPT OF ARCHIVES & HISTORY	8200076996	1475-25-C-CNTR-00001	8/21/2024	12/31/9999	7,000,544.00	Perkins + Will, Inc.	ARCHITECT FOR BUILDINGS	12/9/2024	increase the professional fee (line 1) to \$3,958,061.29 based on a revised construction cost. Also, W.L. Burle replaces Neel-Schaffer as the Civil con
MS DEVELOPMENT AUTHORITY	8200078208	1411-24-C-CNTR-00088	7/1/2024	6/30/2027	100,000.00	Neel-Schaffer, Inc.	ENGINEERS	11/27/2024	Exempt from qualification based selection per statute, in accordance with 27-104-7(2)(b) and (f)(i)(11.) (AM580363 11/27/2024 10:35:26 CST)
DEPT OF REHABILITATION SERVICE	8200078558	1635-25-C-CNTR-00078	11/25/2024	11/24/2025	41,660.00	RVD INVESTMENTS LLC	LEASES	12/11/2024	
MS DEPT OF MILITARY	8800009379	1701-24-C-SOLC-00003	5/8/2024	12/30/2025	1,567,744.08	E Cornell Malone Corporation	CONSTRUCTION - BUILDING	12/9/2024	approval of CO#1 increasing contract amount by \$1,144.08 and 0 days. (AM580363 12/09/2024 11:25:56 CST)

MS DEPT OF MILITARY	8800009442	1701-24-C-SOLC-00004	5/30/2024	12/30/2025	165,228.86	Jackson Brothers Construction Svcs	CONSTRUCTION - BUILDING	11/22/2024	approval of CO#1 for reconciliation of unit prices and decrease of \$482.50 and 0 calendar days (AM580363 11/22/2024 10:35:52 CST) approval
MS DEPT OF MILITARY	8800009502	1701-25-C-SOLC-00008	7/10/2024	1/27/2026	1,233,506.50	FAIRLEY CONSTRUCTION SERVS INC	CONSTRUCTION - OTHER	11/22/2024	approval of Change Order 1 increasing contract amount by \$13,042.50 and 14 calendar days (AM580363 11/22/2024 10:28:59 CST)

Total count: 9

Attachment E

OPSCR

Emergency Contracts

**Emergency Contracts
Office of Personal Service Contract Review
Reported to PPRB in Calendar Year 2025**

**January 2025 Total:
\$0.00**

Emergency Contracts Reported January 8, 2025								
Contract Number	Agency	Contractor	Service	Contract Action	Contract Action Amount	Contract Total Amount	Start Date	End Date
No Emergency Contracts to Report in January 2025								
Total Emergency Contract Actions Reported in January 2025:					\$0.00			

Attachment F

OPSCR

Sole Source Contracts

**Sole Source Contracts
Office of Personal Service Contract Review
Reported to PPRB Calendar Year 2025**

Sole Source Contracts to Report in January 2025

Contract	Agency	Contractor	Service	Action	Amount	Contract Total Amount	Start Date	End Date
No New Sole Source Contracts to Report in January 2025								
Total Reported in January 2025:						\$0.00		

Attachment G

OPSCR

Staff Approvals

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

Staff Approvals Reported January 8, 2025							
Contract #	Agency	Contractor	Service	Action	Amount	Approval Type	Staff Authority
8200078072	Mississippi State Hospital	TD Medical Solutions LLC	Nursing Services	New	\$4,285,714.29	PVL	8.2.2
8200078073	Mississippi State Hospital	HMP Nursing Services Inc	Nursing Services	New	\$4,285,714.29	PVL	8.2.2
8200060387	Mississippi Division of Medicaid	Gainwell Acquistion Corp	Medicaid Management Information System	Technical	\$0.00	Technical	14.8.2.2
8200067801	Mississippi Division of Medicaid	Myers & Stauffer LC	Consulting Services	Technical	\$0.00	Technical	14.8.2.2
8200054150	Mississippi Division of Medicaid	Ascend Management Innovations, LLC	Utilization Management	Technical	\$0.00	Technical	14.8.2.2
8200072277	Mississippi Public Broadcasting	George Blood LP	Archival Film & Video Digitization	Technical	\$0.00	Technical	14.8.2.2
8200078012	Office of Workforce Development	Economic Model, LLC	Consulting Services	New	\$80,000.00	New	3-101.02

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

8200078062	Ellisville State School at South MS Regional Center	SHC Services, Inc	Nursing Services	New	\$800,000.00	PVL	3-208.02
8200065017	Mississippi Department of Environmental Quality	Windham & Lacey PLLC	Auditing Services	Modification	\$24,000.00	Renewal	7-110.02
8200060353	Mississippi Department of Employment Security	Warner Inc	Janitorial Services	Modification	\$573.74	Renewal	7-110.02
8200070509	Mississippi Department of Employment Security	Narrative 12	Communications & Marketing Consulting Serv	Modification	\$20,390.00	Renewal	7-110.02
8200066315	Mississippi Veteran's Affairs	Johnson Staffing Agency LLC	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066316	Mississippi Veteran's Affairs	Johnson Staffing Agency LLC	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066317	Mississippi Veteran's Affairs	Johnson Staffing Agency LLC	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066318	Mississippi Veteran's Affairs	Johnson Staffing Agency LLC	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

8200066339	Mississippi Veteran's Affairs	Precision Healthcare Staffing	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066343	Mississippi Veteran's Affairs	Precision Healthcare Staffing	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066344	Mississippi Veteran's Affairs	Precision Healthcare Staffing	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066349	Mississippi Veteran's Affairs	Prosperity Medical Staffing, LLC	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066360	Mississippi Veteran's Affairs	Prosperity Medical Staffing, LLC	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066360	Mississippi Veteran's Affairs	Prosperity Medical Staffing, LLC	Nursing Services	Modification	(\$175,000.00)	Statutory Exemption	3-503.02.3(d)
8200066361	Mississippi Veteran's Affairs	Prosperity Medical Staffing, LLC	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066362	Mississippi Veteran's Affairs	HMP Nursing Services Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

8200066362	Mississippi Veteran's Affairs	Prosperity Medical Staffing, LLC	Nursing Services	Modification	(\$175,000.00)	Statutory Exemption	3-503.02.3(d)
8200066549	Mississippi Veteran's Affairs	HMP Nursing Services Inc	Nursing Services	Modification	(\$75,000.00)	Statutory Exemption	3-503.02.3(d)
8200066562	Mississippi Veteran's Affairs	HMP Nursing Services Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200066562	Mississippi Veteran's Affairs	HMP Nursing Services Inc	Nursing Services	Modification	(\$75,000.00)	Statutory Exemption	3-503.02.3(d)
8200066564	Mississippi Veteran's Affairs	HMP Nursing Services Inc	Nursing Services	Modification	(\$75,000.00)	Statutory Exemption	3-503.02.3(d)
8200067538	Mississippi Veteran's Affairs	Health Advocates Network, Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200067539	Mississippi Veteran's Affairs	Health Advocates Network, Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200067550	Mississippi Veteran's Affairs	Health Advocates Network, Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

8200067551	Mississippi Veteran's Affairs	Health Advocates Network, Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200072753	Mississippi Veteran's Affairs	Riviera Finance of Texas Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200072780	Mississippi Veteran's Affairs	Riviera Finance of Texas Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200072781	Mississippi Veteran's Affairs	Riviera Finance of Texas Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200072807	Mississippi Veteran's Affairs	Riviera Finance of Texas Inc	Nursing Services	Modification	\$0.00	Statutory Exemption	3-503.02.3(d)
8200074697	Mississippi Veteran's Affairs	HMP Nursing Services Inc	Nursing Services	Modification	(\$25,000.00)	Statutory Exemption	3-503.02.3(d)
8200077973	Mississippi Veteran's Affairs	Medical Edge Recruitment LLC	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200077977	Mississippi Veteran's Affairs	Staffing Innovations Incorporated	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

8200077985	Mississippi Veteran's Affairs	Health Advocates Network, Inc	Nursing Services	New	\$125,000.00	Statutory Exemption	3-503.02.3(d)
8200077987	Mississippi Veteran's Affairs	Johnson Staffing Agency LLC	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200077992	Mississippi Veteran's Affairs	SHC Services, Inc	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200078000	Mississippi Veteran's Affairs	Worldwide Travel Staffing, Ltd	Nursing Services	New	\$10,000.00	Statutory Exemption	3-503.02.3(d)
8200078006	Mississippi Veteran's Affairs	Riviera Finance of Texas Inc	Nursing Services	New	\$300,000.00	Statutory Exemption	3-503.02.3(d)
8200078090	Mississippi Veteran's Affairs	HealthFirst Staffing, LLC	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200078102	Mississippi Veteran's Affairs	Millennial Healthcare LLC	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200078110	Mississippi Veteran's Affairs	Vastika Health, Inc	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

8200078135	Mississippi Veteran's Affairs	Cell Staff, LLC	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200078139	Mississippi Veteran's Affairs	QS Healthcare LLC	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200078143	Mississippi Veteran's Affairs	Healthcare Staffing Professionals, Inc	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200078147	Mississippi Veteran's Affairs	Amani Enterprises Inc	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200078183	Mississippi Veteran's Affairs	Tryfacta, Inc	Nursing Services	New	\$25,000.00	Statutory Exemption	3-503.02.3(d)
8200078195	Mississippi Veteran's Affairs	Elior, Inc	Food Services	New	\$800,000.00	Statutory Exemption	3-503.02.3(d)
8200075261	Mississippi Veteran's Affairs	Systronic Systems LLC	Fire Alarm & Monitoring	Technical	\$0.00	Technical	3-503.02.3(d)
8200067510	Mississippi Veteran's Affairs	Waste Medic LLC	Waste Removal & Disposal	Modification	\$50,000.00	Statutory Exemption	3-503.02.3(d)

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

8200075261	Mississippi Veteran's Affairs	Systronic Systems LLC	Fire Alarm Installation and Monitoring	Technical	\$0.00	Statutory Exemption	3-503.02.3(d)
8200071676	Mississippi Department of Employment Security	Horne LLP	Workforce Development	Modification	(\$84,583.75)	Statutory Exemption	3-101.02(d)
8200066335	Mississippi Veteran's Affairs	Infiniti Healthcare Services, LLC	Nursing Services	Modification	\$1,202,000.00	Statutory Exemption	3-503.02.3(d)
Total Reported in January 2025: \$11,598,808.57							

OPSCR Staff Approval Authority Granted by PPRB	
Section 3-101.02(h)	Contracts exempt by state statute.
Section 3-101.04.3	WIN contract workers when the total contract value does not exceed \$75,000. in a 12-month period.
Section 3-103.04	Assignment of a previously approved contract due to novation, buyout, or change of name.
Section 3-208.02	Contracts with vendors selected from the Preapproved Vendor List.
Section 3-503.02.3(d)	Mississippi Veteran's Affairs contracts for operation of state veteran's homes.
Section 7-102.01	Multiple small purchase contracts with the same vendor but different scopes of service.

Staff Approvals
Office of Personal Service Contract Review
Reported to PPRB in January 2025

Section 7-110.01	Scrivener's errors and technical issues.
Section 7-110.02	Modifications which reduce the dollar amount or in which services are unchanged.
Section 7-110.03	Modifications of up to 10% of the contract amount on previously approved unit price contracts. (Total contract amount cannot exceed \$500,000.)
Section 3-102.04.1	Contracts between two state agencies, both under PPRB purview. These contracts do not require PPRB approval.

**REQUEST FOR
PROPOSALS OR
REQUEST FOR
QUALIFICATIONS**

Full solicitation document as issued by the Agency

Applicable: YES NO

REQUEST FOR PROPOSAL



State Board of Education
Strategic Planning and Performance Scorecard
RFX No. 3120003047

Submission Deadline Date: February 5, 2025

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SECTION 1. INTRODUCTION AND OVERVIEW

This solicitation is to provide information required to submit a response to this Request for Proposal (RFP). Please be aware that changes to previous versions may have been made.

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website](#) under "Public Notice" Request for Applications, Qualifications, and Proposals section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

SECTION 2. PLAN TO ACHIEVE THE SCOPE OF SERVICES

2.1 Scope of Services

The scope of services outlines the activities and deliverables required for developing a comprehensive strategic plan and performance scorecard for the organization. The objective is to create a dynamic, forward-looking plan that aligns with the organization's mission and addresses current and future educational challenges.

The offeror should submit a detailed plan with a 2- phase approach that contemplates a one-year engagement to accomplish the work outlined below. The response should include a timeline of the work and deliverables to be completed in each year.

1. Project Initiation and Planning

- **Kick-off Meeting:** Conduct a project initiation meeting with key SBE and Board Designees clarify objectives, timelines, and roles.
- **Project Work Plan:** Develop a detailed project work plan that outlines milestones, timelines, deliverables, and communication protocols.
- **Stakeholder Identification:** Identify and document key stakeholders (internal and external) to ensure broad engagement and input throughout the process.

2. Environmental Scan and Data Collection

- **Review of Existing Documentation:** Analyze current strategic plans, performance data, and any other relevant documents to understand the organization's context.
- **SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats):** Conduct an analysis to assess internal capabilities and external challenges.
- **Environmental Scan:** Perform a comprehensive scan of the current educational landscape, including trends, regulations, and technological advancements affecting the state of Mississippi.
- **Stakeholder Surveys/Interviews:** Collect input from key stakeholders (board members, educators, policymakers, students, and community members) through surveys, focus groups, or interviews.

3. Strategy Development

- **Mission and Vision Review:** Facilitate discussions with leadership to revisit or reaffirm the organization's mission, vision, and core values.
- **Goal Setting:** Establish long-term strategic goals based on collected data, stakeholder input, and the organization's vision.
- **Strategy Formulation:** Develop key strategies and initiatives that address identified needs and opportunities, including those related to educational outcomes, workforce readiness, and technology integration.

4. Performance Scorecard Development

- **KPI Identification:** Develop Key Performance Indicators (KPIs) for each strategic goal, ensuring they are measurable and aligned with the organization's mission.
- **Scorecard Design:** Create a performance scorecard that visually tracks progress toward strategic goals. The scorecard should include metrics, targets, timelines, and responsibilities for monitoring and reporting.
- **Data Collection Mechanisms:** Identify or create systems for ongoing data collection to measure the effectiveness of strategies and track KPIs.

5. Stakeholder Engagement and Workshops

- **Stakeholder Workshops:** Facilitate workshops with board members, educators, and community leaders to gather feedback on the draft strategic plan and performance scorecard.

- **Engagement Plan:** Develop a stakeholder engagement plan to ensure continued involvement throughout the process, from strategy formulation to final approval.
- **Feedback Incorporation:** Revise the strategic plan and scorecard based on stakeholder input and feedback received during workshops.

6. Drafting and Finalizing the Strategic Plan

- **Draft Strategic Plan:** Develop a detailed draft of the strategic plan that includes the mission, vision, strategic goals, key initiatives, and performance scorecard.
- **Review and Revision:** Present the draft to the leadership team for review and make necessary revisions based on feedback.
- **Final Strategic Plan:** Finalize the strategic plan, ensuring it is a clear, actionable document that includes timelines, responsible parties, and measures for ongoing evaluation.

7. Final Presentation and Handover

- **Presentation to the Board:** Present the final strategic plan and performance scorecard to the board for approval.
- **Documentation Handover:** Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.
- **Training Session:** Conduct a training session for staff on how to use and monitor the performance scorecard to ensure proper implementation.

8. Implementation and Monitoring Plan

- **Implementation Roadmap:** Develop a roadmap that outlines the steps needed to implement the strategic plan, including timelines, resources, and responsibilities.
- **Monitoring and Reporting Mechanism:** Create a process for regularly monitoring progress on the strategic plan and scorecard, including tools for tracking KPIs and reporting results to stakeholders.
- **Review and Adjustment Protocol:** Establish a protocol for reviewing and adjusting the strategic plan and performance scorecard as needed to respond to changing conditions or emerging challenges.

2.2 Contractor Prerequisites

To effectively implement and achieve the services required for updating the strategic plan and performance scorecard, the following are required. Staff with experience in managing similar strategic projects, with strong organizational and communication skills. Staff with a proven track record in strategic planning within the education sector. Staff skilled in data analysis. Staff with expertise in developing KPIs and performance tracking systems. Staff with strong communication skills with experience engaging diverse groups. Staff with excellent writing and editing skills, with experience drafting professional documents.

2.3 Deliverables

6 Months	<ul style="list-style-type: none"> • Project Work Plan • SWOT Analysis and Environmental Scan Report • Stakeholder Engagement Plan • Draft Strategic Plan and Performance Scorecard • Final Strategic Plan and Performance Scorecard • Final Presentation and Training by October 1, 2025
6 Months	<ul style="list-style-type: none"> • Implementation Roadmap • Monitoring and Reporting Protocols

2.4 Price

By submitting a proposal, the Offeror certifies that the price submitted was independently arrived at without collusion.

Because of the scope of this project, we believe it should be possible for different Offerors to arrive at vastly differing estimates of resources required. It is anticipated that this shall allow the Offeror to explain exactly what the State shall receive for this amount of funds and shall allow evaluators to determine the best proposals based upon the plan of action and the description of what the State shall receive in exchange for this amount. The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.

SECTION 3. REQUEST FOR RECONSIDERATION

Any potential Offeror has an opportunity to request that the MDE reconsider the terms of the solicitation. Any such request shall be filed with the MDE’s Office of Procurement, attention Monique Corley, Director and the Director of OPSCR **within three (3) business days following the date of the first public notice**. It shall be the sole responsibility of the requesting vendor to ensure the request is timely received by all required parties. Failure to timely request reconsideration in compliance with this Section results in waiver of any claim regarding the terms of the solicitation.

The request shall contain the following:

- requesting vendor’s name, a single contact person and all contact information for the contact person
- the RFX number of the solicitation, and the date the RFP was issued
- the request shall identify which of these rules and regulations the requesting vendor believes to have been violated by the solicitation, as written
- the request may not be based on anything other than the solicitation document and PPRB OPSCR’s rules and regulations
- exhibits shall not be included with the request. Rather, the requesting vendor shall clearly identify the section(s) of the solicitation document at issue in its request
- the request shall not be supplemented

MDE Email Address: ProcurementQnR@mdek12.org

Subject Line: Reconsideration Letter; Solicitation RFx No. 3120003047

PPRB Email Address: Amelia.Gamble@dfa.ms.gov

Subject Line: Reconsideration Letter; Solicitation RFx No. 3120003047

3.1 Agency Decision on Request for Reconsideration

The MDE shall consider whether the solicitation document, as written, contains the violation alleged by the requesting potential Offeror and issue a written response to the request. The Agency's discretion to make subjective decisions in response to a request for reconsideration is limited only by the requirement that such discretion be supported by a legitimate business reason and exercised in a manner that is fair to all potential bidders.

The MDE's decision shall be issued in a sufficient amount of time for the requesting Offeror to consider the MDE response in preparation of its proposal, even if this requires the proposal submission deadline to be amended. If the MDE decision is issued less than 14 days prior to the proposal submission deadline, the MDE shall make a written determination that the amount of time allotted between the issuance of the MDE decision, and the proposal submission deadline is reasonable under the circumstances.

SECTION 4. REFERENCES

The Program Office staff and the Office of Procurement must be able to contact two (2) trade references, if required, within five (5) business days of proposal opening to ensure the Offeror is responsible, if the MDE requires additional information. (See Appendix D)

1. List up to a minimum of three (3) clients, including government clients, for whom your company has performed services similar to those requested in this solicitation. The Offeror must provide sufficient client detail to demonstrate it has significant experience in working with programs similar to scope of this solicitation.

For each client, the list must specify:

- a. Client name, include contact person, title (director or administrator etc.), location address, e-mail address, and phone number;
- b. The type of work your company provided to the client; and
- c. Contract dates (beginning and end dates) your company provided services to the client.

SECTION 5. MINIMUM QUALIFICATIONS

The following minimum qualifications are mandatory. If, in the opinion of the MDE, the Offeror fails to prove that the proposing company meets any of these **minimum qualifications**, the proposal will be disqualified from further evaluation. It is the responsibility of the Offeror to submit a complete proposal on or before the submission deadline. Offeror must have at least 5 years' experience in strategic planning and performance management with other educational organizations. The offeror should provide information that demonstrates ability to engage and collaborate with a wide array of stakeholders. The ability to research and analyze data to determine trends and to establish a performance tracking system.

1. The Offeror must provide:
 - a. Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.
 - b. The age of the Offeror's business and average number of employees for the past **five (5) years**,
 - c. Offerors must list their principals, parent organizations, and subsidiary organizations in their proposal or qualification. Principals shall include founder, investors, owner, co-owners, CEO, Chief, all executive level employees.
 - d. The abilities, qualifications, and experiences of all persons who would be assigned to provide required services,
 - e. The required references as noted in Section 3 – References, and
 - f. The Offeror must provide a detailed plan describing how the scope of services will be planned, implemented, achieved, and the reports provided that will give the MDE the support and results required to verify services were accomplished and complete.
2. The Vendor shall provide all services directly related to this contract from an office(s) located in the United States. Indicate your agreement with this requirement and identify any locations outside the State of Mississippi in which you propose to provide the services described in this solicitation.
3. Include in your responses the total number of years in business and the company's experience related to the scope of work.
4. If federal funds are allocated for payment, Offeror must verify its business is not debarred.
5. Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, **a performance bond is due to the program office contact each year prior to the commencement of services.** The performance bond shall not be waived or negotiated.

5.1 Questions and Answers

Questions must be submitted to ProcurementQnR@mdek12.org and must be received no later than **Friday January 24, 2025, by 2:00 PM CST**, to ensure a response by the MDE. Responses to questions will be posted to the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section as an amendment to the solicitation on **Tuesday, January 28, 2025**. Questions received after **the deadline** will not be considered for a response. It is the Offeror's sole responsibility to regularly monitor the website for amendments and/or announcements concerning this solicitation.

5.2 Acknowledgment of Amendments

The MDE reserves the right to amend this solicitation at any time. Should an amendment to the solicitation be issued, it will be posted to the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. Offerors must acknowledge receipt of any amendment to the solicitation by signing and returning the amendment acknowledgment form. Please monitor the website for amendments to the solicitation.

The MDE responses to questions will be treated as amendments to the solicitation and will require acknowledgment. It is the Offeror's sole responsibility to monitor MDE website or emails for amendments to this solicitation.

5.3 Cost of Proposal Preparation

All costs incurred by the Offeror in preparing and delivering its proposal, making presentations, and any subsequent time and travel to meet with the MDE regarding its proposal shall be borne exclusively at the Offeror's expense.

5.4 Right to Reject, Cancel and/or Issue Another Solicitation

The MDE specifically reserves the right to reject in whole or in part for proposals received in response to the solicitation, cancel the solicitation in its entirety, or issue another solicitation when in the best interest of the MDE.

5.5 Contract and Property Rights

Contract rights do not vest in any party until a contract is legally executed. The MDE is under no obligation to award a contract following issuance of this solicitation.

Property rights do not inure to any offeror until such time as services have been provided under a legally executed contract. No party responding to this RFP has a legitimate claim of entitlement to be awarded a contract or to the provision of work thereunder. MDE is under no obligation to award a contract and may terminate a legally executed contract at any time.

5.6 Registration with Mississippi Secretary of State

By submitting a proposal, the Offeror certifies that it is registered to do business in the State of Mississippi as prescribed by Mississippi law and the Mississippi Secretary of State.

5.7 Debarment

By submitting a proposal, the Offeror certifies that it is not currently debarred from submitting proposals for contracts issued by any political subdivision or agency of the State of Mississippi or Federal Government and that it is not an agent of a person or entity that is currently debarred from submitting proposals for contracts issued by any political subdivision or agency of the State of Mississippi.

5.8 State Approval

It is understood that this contract may require approval by the SBE/PPRB. If required and if this contract is not approved, it is void and no payment shall be made hereunder. Every effort shall be made by the MDE to facilitate rapid approval and a start date consistent with the proposed schedule; however please note the schedule is tentative.

SECTION 6. PROCUREMENT OF CONTRACTS

6.1 Restrictions on Communications with the MDE Staff

At no time shall any Offeror or its personnel, contact or attempt to contact, any MDE staff regarding this solicitation except the contact specified in the Questions and Answers Section. **Should it be determined that any Offeror has attempted to communicate or has communicated with any MDE employee outside of the Office of the Superintendent**

regarding this solicitation, the MDE, at its discretion, may disqualify the Offeror from submitting a proposal in response to this SOLICITATION.

6.2 Submission Requirements

For proposals that are shipped/mailed, the proposal shall be submitted in one original notebook binder using the Required Format in the section below. For proposals that are submitted in the Mississippi Accountability Governmental Information Collaboration System (MAGIC), the proposal shall be submitted using the Required Format in the section below.

Each page of the proposal must be numbered. Multiple page attachments and samples should be numbered internally within each document and not necessarily numbered in the overall page number sequence of the entire proposal. The intent of this requirement is for the Offeror to submit all information in a manner that it is clearly referenced and easy to locate.

The Offeror shall provide the required format for shipping/ mailing responses as follows:

- a. An **original hard copy** of the proposal shall include all components and attachments required below. A USB drive shall include the original copy of the proposal. The searchable Microsoft Office® format, preferably in Word® or Portable Document Format (PDF®) shall be included in the side pocket of the original notebook in the format as indicated below.

Required Format:

The Offeror shall provide the following:

- a. one (1) original signed copy of the complete proposal including all attachments.

Section components must be clearly distinguished as follow:

1. COVER PAGE - Proposal Cover Sheet (Appendix A)

2. COMPONENT 1 – PLAN OF ACTION

- a. **Tab 1 – Production/Detailed Service Plan** shall provide clear and concise plan of action to encompass the minimum qualifications, implementation, deliverables, and expected outcomes/results to achieve the scope of work. Any required information that is omitted and not addressed in the minimum qualifications section will disqualify submission and will not be considered for an award.

3. COMPONENT 2 - ADMINISTRATION

- a. **Tab 2 – Resume(s) for Key Personnel** must include qualifications and experiences for all key personnel assigned to this project.
- b. **Tab 3 – References** must meet the requirements as set forth in the References section. (See Section 3)

4. COMPONENT 3 – PRICE

- a. **Tab 4 – Price/Budget**

5. COMPONENT 4 – OTHER

- a. **Tab 5** – Any additional relevant information (not to exceed five (5) pages).
- b. **Tab 6** – Signed Contingent Fee/Acknowledgement of Amendments, if applicable.

If you have additional information you would like to provide, include it as the **Component Section** of your proposal. Failure to provide all requested information and in the required format may result in disqualification of the Proposal. All requested information is considered important. The MDE has no obligation to locate or acknowledge any information in the proposal that is not presented under the appropriate outline and in the proper location according to the instructions herein.

Unsolicited modifications or additions to any portion of the procurement document may be a cause for rejection of the Proposal. The MDE reserves the right to decide, on a case-by-case basis, whether to reject a proposal with unsolicited modifications or additions as non-responsive. As a precondition to proposal acceptance, the MDE may request the Offeror to withdraw or modify those portions of the proposal deemed non-responsive that do not affect quality, quantity, price, or delivery of the service. The solicitation issued by the MDE is the official version and will supersede any conflicting solicitation language subsequently submitted in proposals.

6.3 Confidential or Trade Secret

In addition to the **original proposal**, if the proposal contains **confidential or trade secret, commercial, and financial information**, one (1) additional *confidential or trade electronic copy* of the complete proposal including all attachments shall be submitted in a searchable Microsoft Office® format, preferably in Word® or Portable Document Format (PDF).

The one (1) additional electronic copy shall be labeled “Redacted” CONFIDENTIAL Proposal and must be submitted with the response by the deadline date for submission. The Offeror shall identify and redact trade secret, commercial, and financial information which shall remain confidential throughout the original proposal or the **MDE shall consider the entire Proposal to be public record.** Per Mississippi Code Annotated §25-61-9(7), the type of service to be provided, the price to be paid and the term of the contract cannot be deemed confidential.

The **“Redacted” CONFIDENTIAL Proposal** shall be considered public record and immediately released, without notification to Offeror, pursuant to any request under the Mississippi Public Records Act, Miss. Code Ann. §25-61-1 *et seq.* and Miss. Code Ann. §79-23-1. **If a “Redacted” CONFIDENTIAL Proposal is not received, the original copy shall be used and released for any reason deemed necessary by the MDE, including but not limited to, submission to the PPRB, posting to the Transparency Mississippi website, releasing due to a Public Records Request, etc.**

The Offeror may be subject to exclusion if the MDE or the PPRB determines that redactions made by the Offeror were made in bad faith in order to prohibit public access to the portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1.

All documentation submitted in response to this solicitation and any subsequent requests for information pertaining to this solicitation shall become the property of the MDE and will not be returned to the Offeror.

6.4 Proposal Submission Period

A signed proposal packet shall be submitted electronically via the [Mississippi Accountability Governmental Information Collaboration System \(MAGIC\)](#) no later than **Wednesday, February 5, 2025**, by 2:00 PM Central Standard Time (CST). Proposals shall be submitted electronically in the Mississippi Accountability Governmental Information Collaboration System (MAGIC). Please visit and register at DFA: Mississippi Suppliers (Vendors) ([ms.gov](#)). If assistance is required, contact MASH help desk at 601-359-1343 at least 72 hours in advance of the due date for submission. Proposals received after the time designated in the solicitation shall be considered late and shall not be considered for award.

OR

Shipping instructions are provided below:

An original signed proposal packet **with number (5) copies** shall be shipped/mailed and received in a sealed envelope at the MDE no later than **Wednesday, February 5, 2025 by 2:00 PM Central Standard Time (CST)**.

The **return address label** must be visible on the **outside of the sealed shipping envelope** and shall include the name of the **individual/entity submitting the response**. Any deviation from these instructions may result in disqualification of the response proposal and shall not be considered for an award.

Ship To:

MONIQUE CORLEY
Office of Procurement
The Mississippi Department of Education
State Board of Education Strategic Planning and Performance Scorecard
RFX# 3120003050
359 North West Street
Jackson, Mississippi 39201

Timely submission of the proposal package is the sole responsibility of the Offeror. It is suggested that if the proposal is shipped to the MDE, it should be tracked to require an MDE mailroom staff signature and request a return receipt/notice with signature. *Any proposal shipped or mailed **MUST** be verified, date and time stamped and recorded by an **MDE mailroom staff**.* The time and date of the receipt will be indicated on the sealed proposal envelope or package by the MDE mailroom staff. The only acceptable evidence to establish the time of receipt at the MDE will be identified by the time and date stamp of the MDE mailroom staff on the proposal wrapper or other documentary evidence of receipt used by the mailroom.

Packages that are delivered in person by the Offeror or a representative will NOT be opened. Packages received by shipping/mail without the appropriate acceptance by the MDE mailroom staff or is received and recorded AFTER the submission deadline will NOT be considered for an award.

The MDE will not be responsible for delivery delays or lost packets. All risk of late arrival due to unanticipated delays – whether delivered by shipping or electronic method – is entirely on the Offeror. All Offerors are urged to take the possibility of delay into account when submitting the proposal and submit the packet electronically via [MAGIC](#). The Offeror shall be notified as soon as practicable if their proposal was rejected and the reason for such rejection.

6.5 Proposal Exclusion

Any Offeror submitting a proposal in which has contracted with the MDE failed to satisfactorily perform services required under any contract shall exclude the vendor from this and future contract award. The MDE shall use written documentation and/or the annual performance evaluation to support disqualifying the vendor as non-responsible.

6.6 Important Tentative Dates

Friday, January 10, 2025 Friday, January 17, 2025	Request for Proposal advertise dates
Friday, January 24, 2025	Deadline to submit questions and request for clarification by 2:00 PM CST
Tuesday, January 28, 2025	Responses to questions and request for clarification posted
Wednesday, February 5, 2025	Proposal submission deadline by 2:00 PM CST
Wednesday, March 5, 2025	OPSCR deadline
Thursday, March 20, 2025	State Board of Education (SBE) Meeting
Wednesday, April 2, 2025	PPRB approval and contract effective date

6.7 Acceptance of Proposals

After receipt of the proposals, the MDE reserves the right to award the contract based on the terms, conditions, premises of the solicitation, and the proposal of the selected company without negotiation.

All properly submitted proposals shall be accepted by the MDE. After the compliance review or evaluating of proposals, the MDE may request necessary amendments from all Offerors, reject any or all proposals received, or cancel this solicitation, according to the best interest of the MDE and the State of Mississippi.

The MDE also reserves the right to waive minor irregularities in proposals providing such action is in the best interest of the MDE and the State of Mississippi. A minor irregularity is defined as a variation of the solicitation which does not affect the price of the proposal or give one party an advantage or benefit not enjoyed by other parties, or adversely impacts the interest of the MDE. Where the MDE may waive minor irregularities as determined by the MDE, such waiver shall in no way modify the solicitation requirements or excuse the Offeror from full compliance with the solicitation specifications and other contract requirements should the Offeror be awarded the contract.

The MDE reserves the right to exclude any and all non-responsive proposals from any consideration for contract award. The MDE shall award a contract to the Offeror whose proposal is responsive to the solicitation and is most advantageous to the MDE, the SBE, and the State of Mississippi in price, quality, and other factors considered.

6.8 Disposition of Proposal

The proposal submitted by the successful Offeror shall be incorporated into and become part of the resulting contract. All proposals received by the MDE shall upon receipt become and remain the property of the MDE. The MDE shall have the right to use all concepts contained in any proposal and this right shall not affect the solicitation or rejection of the proposal.

6.9 Modification or Withdrawal of a Proposal

Prior to the proposal submission deadline, a submitted proposal may be withdrawn by submitting a written request for its withdrawal to the MDE, signed by the Offeror.

An Offeror may submit an amended proposal before the proposal submission deadline. Such amended proposals shall be a complete replacement for a previously submitted proposal and shall be clearly identified as such. The MDE shall not merge, collate, or assemble proposal materials.

Unless requested by the MDE, no other amendments, revisions, or alterations to proposals shall be accepted after the proposal submission deadline. Any submitted proposal shall remain a valid proposal for one hundred eighty (180) calendar days from the proposal submission deadline.

6.10 Rejection of Proposals

A proposal response that includes terms and conditions that do not conform to the terms and conditions specified within this solicitation is subject to rejection as non-responsive. Further, submission of a proposal that is not complete and/or unsigned is subject to rejection as non-responsive. The MDE reserves the right to permit the Offeror to withdraw nonconforming terms and conditions from its proposal response prior to a determination by the MDE of non-responsiveness based on the submission of nonconforming terms and conditions. Additional reasons for rejecting a proposal include:

1. The proposal contains unauthorized amendments to the requirements of the solicitation;
2. The proposal is conditional;
3. The proposal is incomplete or contains irregularities, which make the proposal indefinite or ambiguous;
4. The proposal did not follow submission requirement;
5. The proposal cover sheet does not have an original or electronic authentication signature by the authorized representative;
6. The proposal contains false or misleading statements or references;
7. The Offeror is determined to be non-responsive;
8. The products or service item offered in the proposal is unacceptable by reason of its failure to meet the requirements of the specifications or permissible alternates or other acceptable criteria set forth in the solicitation;
9. The proposal is received late. Late proposals shall be maintained unopen in the procurement file;
10. The Offeror or representative emails the proposal response packet to an MDE staff;
11. The Offeror has filed business bankruptcy, been implicated in fraud and/or been debarred within the past seven (7) years;
12. The Offeror did not perform prior MDE services in an honorable and/or proper like manner;
13. The Offeror currently indebted to the State;
14. Objection with the Standard Terms and Conditions; or
15. In person delivery of proposal.

6.11 Corrections and Clarifications

The MDE reserves the right to request clarifications or corrections to proposals after the response has met the submission requirements and the response is deemed responsible for an award. Any proposal received which does not meet the requirements of this solicitation will be considered non-responsive and eliminated from further consideration.

6.12 Proposal Evaluation

All proposals received in response to this solicitation by the stated deadline will receive a comprehensive, fair, and impartial evaluation. An evaluation committee will evaluate the proposals using a two or three-phase process, consisting of Compliance, and Analysis, and Finalist phases. A **100-point scoring scale** will be used in the evaluation process for proposals determined to be in compliance and responsive to the solicitation. For proposals ultimately determined to be finalists, Offerors must meet a minimum score of 80% and the additional points will be added based on presentations, if applicable. The evaluation of any proposal may be suspended and/or terminated at the MDE's discretion at any point during the evaluation process at which the MDE determines that said proposal and/or Offeror fails to meet any of the mandatory requirements as stated in this solicitation, the proposal is determined to contain fatal deficiencies to the extent that the likelihood of selection for contract negotiations is minimal, or the MDE and/or the SBE receives reliable information that would make contracting with the Offeror impractical or otherwise not in the best interests of the SBE and/or the State of Mississippi.

The evaluation process, including evaluation factors and weights are described below:

Compliance Phase - In this pass or fail phase of the evaluation process, all proposals received will be reviewed by the procurement officer and/or designee to determine if the following mandatory requirements of this solicitation have been satisfied:

1. Proposal received by submission deadline;
2. Required proposal submission format followed;
3. Minimum Qualifications met;
4. Proposal Cover Sheet (Appendix A);
5. Production/Detailed Service Plan;
6. Resumes for Key Personnel;
7. References;
8. Cost Data; and
9. All Required Signed Forms (if applicable).

Failure to comply with these requirements may result in the proposal being eliminated from further consideration. Offerors passing the Compliance Phase will be evaluated further.

Weight –The Compliance Phase is a pass or fail phase of the evaluation.

Analysis Phase – In this phase of the evaluation process, the evaluation committee will score proposals to determine a numerical score for each qualified Offeror. Numerical scores will be calculated based on the following criteria. Evaluation factors are listed below in order of their relative importance and weight:

1. **Price (Weight/Value – at least 35 %)** – The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.
2. **Plan of Action (Weight/Value – 40%)** –
 - a. **30%** - The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach;
 - b. **10%** - Provide a documented record of past performance of providing similar services.

3. **Management (Weight/Value – 25%)** – Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required.
4. Upon completion of the Analysis Phase, the evaluation committee’s average score will determine if a finalist will move to the Finalist Phase (presentations). **If presentations are not included within this solicitation, the finalist with the highest or highest to lowest ranking average score will be the Awarded Vendor(s) after completion of the Analysis Phase.**

Upon completion of the evaluation of proposals, the evaluation committee’s average score will determine the top scoring proposal(s) and the Program Office will make a recommendation to the SBE as to the proposal deemed most advantageous to the State and to authorize the issuance of an Intent to Award contract notification to the selected vendor and authorize contract negotiations with the selected vendor, if applicable. Subsequent to authorization by the SBE, all participating vendors will be notified in writing of the contract award.

SECTION 7. PUBLIC RECORDS

7.1 Deadlines for Production of Public Records Tolled

When the MDE is preparing or conducting a competitive procurement, the time limitations for producing public records regarding the procurement **shall be tolled until the MDE determines it will not issue the procurement, cancels the procurement, or issues a notice naming its intended awardee. Mississippi Code Annotated § 25-61-5(4).**

7.2 Delay of Procurement Process Not Required

There is no requirement the MDE must delay any aspect of the procurement process due to an outstanding request for public records.

7.3 Efficient Administration of Agency Obligations

The MDE has the discretion under the PPRB rules and regulations to require vendors responding to an MDE solicitation to take any action necessary for the efficient and effective administration of the MDE’s procurement and obligations under the *Mississippi Public Records Act*, unless such action directly violates the *Mississippi Public Records Act*.

SECTION 8. CONTRACT AWARD

Funds and awards are subject to appropriations by the state/federal government. This is a multi-term contract that will be awarded contingent on availability of funds. The one (1) year contract is contingent of continuation of services required and funding.

All contracts will be awarded contingent upon appropriations, proper implementation of the proposed project implementation, completion, and submission of all required documentation. Funding to eligible vendors is subject to the SBE and PPRB approvals, if applicable. **The Mississippi Department of Education reserves the right to negotiate award amounts with all potential Offerors.**

The RFP, its amendments, the offeror's proposal, and the Best and Final Offer (BAFO), if applicable, shall be incorporated into the successful offeror(s)' contract.

8.1 Right of Negotiation

Discussions and negotiations regarding price and other matters may be conducted with a proposer who submits a proposal determined to have reasonable likelihood of being selected for award, but a proposal may be accepted without such discussions. The SBE reserves the right to further clarify and/or negotiate with the proposer evaluated best following completion of the evaluation of proposals but prior to contract execution, if deemed necessary by the SBE. The SBE also reserves the right to move to the next best proposer if negotiations do not lead to an executed contract with the best proposer. The SBE reserves the right to further clarify and/or negotiate with the proposer on any matter submitted.

8.2 The Mississippi Department of Education

The specific responsibilities of the MDE are stated below.

- Provide a contact person to work with the contractor to ensure quality control
- Review and approve timeframes and work plans
- Provide available information to assist the contractor

8.3 Management Responsibilities of Personnel and Administration

Except where expressly provided otherwise herein, each party shall bear its own cost incurred in performing its responsibilities hereunder. The contractor shall provide one person who shall be responsible for all activities required to fulfill said contract. This individual shall be invested with the authority to make decisions and commitments on behalf of the contracted party during the performance of the solicitation.

The MDE shall also designate one representative who shall act as the primary contact for this office. This representative shall be responsible for conferring all parties necessary to resolve unanticipated issues or requirements that might occur during the course of the solicitation.

8.4 Memorandum of Understanding

The execution of a Memorandum of Understanding (MOU) shall be required prior to the release of any student level data by the Mississippi Department of Education. Failure to adhere to the provisions of the MOU may result in termination of the contract and/or may result in denial of subsequent renewal requests.

8.5 Ethics

In compliance with State law, a Contractor who is employed by a public entity agrees to make arrangements with his/her employer to take the appropriate leave (annual, professional, compensatory, etc.) during the period of service covered by this contract. Contractor also agrees not to utilize resources of the public employer to perform the services pursuant to this contract. Prior to execution of this contract, Contractor must submit to the MDE a Certification (on the MDE form) executed from his/her employer whereby the public employer acknowledges that it is aware of its employee working for the MDE.

8.6 Termination in Event of Employment

Contract shall be terminated immediately if Contractor becomes an employee of the MDE and is only subject to payment of services prior to effective date of employment at the MDE.

Appendix A – Proposal Cover Sheet

Company/Name: _____

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	
Mailing Address	
City, State, Zip	
Telephone:	
E-Mail Address:	

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? ____ YES ____ NO
2. If known, what is your supplier number? _____
3. Are you currently registered with PayMode? ____ YES ____ NO
4. Are you a minority owned company? ____ YES ____ NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: _____ Date: _____

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Appendix B – Standard Terms and Conditions

Certain terms and conditions are required for contracting. Therefore, the Offeror shall assure agreement and compliance with the following standard terms and conditions.

1. ACKNOWLEDGMENT OF AMENDMENTS

Offerors shall acknowledge receipt of any amendment to the [PROPOSAL, RFP, RFQ, RFA] in writing. The acknowledgement shall be submitted as an attachment to the proposal. Each Offeror shall submit a written acknowledgement of every amendment to the MDE on or before the submission deadline.

2. ACCEPTANCE PERIOD

The electronic copy of the response (proposal) shall be signed and submitted as required in the instructions provided in the solicitation no later than the time and date specified for receipt of responses. Timely submission of the response is the responsibility of the bidder.

3. ACCESS TO RECORDS

Contractor agrees that the MDE, or any of its duly authorized representatives, at any time during the term of this agreement, shall have access to, and the right to audit and examine any pertinent books, documents, papers, and records of Contractor related to Contractor's charges and performance under this agreement. Such records shall be kept by Contractor for a period of three (3) years after final payment under this agreement, unless the MDE authorizes their earlier disposition. Contractor agrees to refund to the MDE any overpayment disclosed by any such audit. However, if any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of 3-year period, the records shall be retained until completion of the action and resolution of all issues which arise from it.

4. ANTI-ASSIGNMENT/SUBCONTRACTING

Contractor acknowledges that it was selected by the State to perform the services required hereunder based, in part, upon Contractor's special skills and expertise. Contractor shall not assign, subcontract, or otherwise transfer this agreement, in whole or in part, without the prior written consent of the State, which the State may, in its sole discretion, approve or deny without reason. Any attempted assignment or transfer of its obligations without such consent shall be null and void. No such approval by the State of any subcontract shall be deemed in any way to provide for the incurrence of any obligation of the State in addition to the total fixed price agreed upon in this agreement. Subcontracts shall be subject to the terms and conditions of this agreement and to any conditions of approval that the State may deem necessary. Subject to the foregoing, this agreement shall be binding upon the respective successors and assigns of the parties.

5. APPLICABLE LAW

The contract shall be governed by and construed in accordance with the laws of the State of Mississippi, excluding its conflicts of laws provisions, and any litigation with respect thereto shall be brought in the courts of Mississippi.

6. APPROVAL

It is understood that if this contract requires approval by the Public Procurement Review Board ("PPRB") and/or the Department of Finance and Administration Office of Personal Service Contract Review ("OPSCR") and this contract is not approved by the PPRB and/or OPSCR, it is void and no payment shall be made hereunder.

7. ATTORNEY'S FEES AND EXPENSES

In the event Contractor defaults on any obligations under this Agreement, Contractor shall pay to the MDE all costs and expenses, without limitation, incurred by the MDE in enforcing this Agreement or reasonably related to enforcing this Agreement. This includes but is not limited to investigative fees, court costs, and attorneys' fees. Under no circumstances shall the MDE be obligated to pay attorneys' fees or legal costs to Contractor.

8. AUTHORITY OF SIGNATORY

Contractor acknowledges that the individual executing the contract on behalf of the MDE is doing so in his or her official capacity only. To the extent any provision contained in the contract exceeds the signatory's authority, Contractor agrees that it will not look to that individual in his or her personal capacity or otherwise seek to hold him or her individually liable for exceeding such authority.

9. AUTHORITY TO CONTRACT

Contractor warrants: (1) that it is a validly organized business with valid authority to enter into this agreement; (2) that it is qualified to do business and in good standing in the State of Mississippi; (3) that entry into and performance under this agreement is not restricted or prohibited by any loan, security, financing, contractual, or other agreement of any kind; and, (4) notwithstanding any other provision of this agreement to the contrary, that there are no existing legal proceedings or prospective legal proceedings, either voluntary or otherwise, which may adversely affect its ability to perform its obligations under this agreement.

10. AVAILABILITY OF FUNDS

It is expressly understood and agreed that the obligation of the MDE to proceed under this agreement is conditioned upon the appropriation of funds by the Mississippi State Legislature and the receipt of appropriated funds. If the funds anticipated for the continuing time fulfillment of, the MDE shall have the right upon ten (10) working days written notice to Contractor, to terminate this agreement without damage, penalty, cost or expenses to the MDE of any kind whatsoever. The effective date of termination shall be as specified in the notice of termination.

11. BACKGROUND CHECKS

Contractor and/or its employees represents neither has ever been convicted or pled guilty or entered a plea of nolo contendere to a felony in any court of the state of Mississippi, another state, or in federal court in which public funds were unlawfully taken, obtained or misappropriated in the abuse of misuse of any office or employment or money coming into its hands by virtue of any office or employment. Contractor and/or its employees agrees to an initial criminal background check to be performed as well as subsequent criminal background checks that may be necessary and all charges associated with these criminal background checks will be the responsibility of Contractor, if applicable. Any disqualifying information received from the criminal background check will render this agreement null and void.

12. BOARD APPROVAL

It is understood that if this contract requires approval by the Mississippi State Board of Education, and this contract is not approved by the Mississippi State Board of Education, it is void and no payment shall be made hereunder.

13. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION

By submitting a proposal the offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without any consultation, communication, or agreement with any other [bidder, offeror] or competitor for the purpose of restricting competition.

14. CHANGES IN SCOPE OF WORK

The MDE may order changes in the work consisting of additions, deletions, or other revisions within the general scope of the contract. No claims may be made by Contractor that the scope of the project or of Contractor's services has been changed, requiring changes to the amount of compensation to Contractor or other adjustments to the contract, unless such changes or adjustments have been made by written amendment to the contract signed by the MDE and Contractor.

If Contractor believes that any work is not within the scope of the project, is a material change, or will otherwise require more compensation to Contractor, Contractor must immediately notify the MDE in writing of this belief. If the MDE believes that the work is within the scope of the contract as written, Contractor will be ordered to and shall continue with the work as changes and at the cost stated for the work within the contract.

15. COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Contractor understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

16. COMPLIANCE WITH LAWS

Contractor shall comply with, and all activities under this agreement shall be subject to, all applicable federal, state, and local laws and regulations, as now existing and as may be amended or modified.

17. CONFIDENTIALITY

The MDE is a public agency of the State of Mississippi and is subject to the *Mississippi Public Records Act of 1983*. Miss. Code Ann. §§ 25-61-1 *et seq.* If a public records request is made for any information provided to the MDE by Contractor, the MDE shall follow provisions of Mississippi Code Annotated §§ 25-61-9 and 79-23-1 before disclosing such information – unless Contractor has previously indicated the information is not trade secret or confidential commercial and financial information. The MDE shall not be liable to the Contractor for disclosure of information required by court order or required by law.

18. CONTRACT ASSIGNMENT AND SUBCONTRACTING

Contractor acknowledges that it was selected by the MDE to perform the services required hereunder based, in part, upon Contractor's special skills and expertise. Contractor shall not assign, subcontract, or otherwise transfer this agreement, in whole or in part, without the prior written consent of the MDE, which may, in its sole discretion, approve or deny without reason. Any attempted assignment or transfer of Contractor's obligations hereunder without consent of the MDE shall be null and void.

Subcontracts shall be subject to the terms and conditions of this agreement and to any conditions of approval that the MDE may deem necessary. Subject to the foregoing, this agreement shall be binding upon the respective successors and assigns of the parties.

MDE reserves the right to request changes in personnel assigned to the project. The MDE Project Manager must pre-approve any changes in key personnel through the contract term. Substitutions are not permitted without written approval of the MDE Program Project Manager.

19. CONTRACT RIGHTS

Contract rights do not vest in any party until a contract is legally executed. The MDE is under no obligation to award a contract following issuance of this solicitation.

20. CONTRACTOR PERSONNEL

The MDE shall, throughout the life of the contract, have the right of reasonable rejection and approval of staff or subcontractors assigned to the work by Contractor. If the MDE reasonably rejects staff or subcontractors, Contractor shall provide replacement staff or subcontractors satisfactory to the MDE in a timely manner and at no additional cost to the MDE. The day-to-day supervision and control of Contractor's employees and subcontractors is the sole responsibility of Contractor.

Contractor agrees that, at all times, the employees of contractor furnishing or performing any of the services specified under this agreement shall do so in a proper, workmanlike, and dignified manner.

21. COPYRIGHTS

Contractor agrees the MDE shall determine the disposition of the title to and the rights under any copyright by Contractor or employees on copyrightable material first produced or composed under this agreement. Further, Contractor hereby grants to the MDE a royalty-free, nonexclusive, irrevocable license to reproduce, translate, publish, use and dispose of, and to authorize others to do so, all copyrighted (or copyrightable) work not first produced or composed by Contractor in the performance of this agreement, but which is incorporated in the material furnished under the agreement. This grant is provided that such license shall be only to the extent Contractor now has, or prior to the completion of full final settlements of agreement may acquire, the right to grant such license without becoming liable to pay compensation to others solely because of such grant. Contractor further agrees that all material produced and/or delivered under this contract will not, to the best of Contractor's knowledge, infringe upon the copyright or any other proprietary rights of any third party. Should any aspect of the materials become, or in Contractor's opinion be likely to become, the subject of any infringement claim or suit, Contractor shall procure the rights to such material or replace or modify the material to make it non-infringing.

22. DEBARMENT AND SUSPENSION

Contractor certifies to the best of its knowledge and belief, that it:

- (1) is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transaction by any federal department or agency or any political subdivision or agency of the State of Mississippi;
- (2) has not, within a three year period preceding this qualification, been convicted of or had a civil judgment rendered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction;
- (3) has not, within a three year period preceding this qualification, been convicted of or had a civil judgment rendered against it for a violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (4) is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state or local) with commission of any of these offenses enumerated in paragraph two (2) and (3) of this certification; and,

(5) has not, within a three year period preceding this qualification, had one or more public transactions (federal, state, or local) terminated for cause or default.

23. DISCLOSURE OF CONFIDENTIAL INFORMATION

In the event that either party to this agreement receives notice that a third-party has served upon it a subpoena or other validly issued administrative or judicial process ordering divulgence of the other party's data or other confidential or otherwise protected information, the party subject to the subpoena or other legal process shall promptly inform the other party at the earliest reasonable opportunity, unless prohibited by law from doing so. Thereafter, the party subject to the legal process shall respond to the extent mandated by law. This section shall survive the termination or completion of this agreement. The parties agree that this section is subject to and superseded by Miss. Code Ann. §§ 25-61-1 *et seq.*

24. E-PAYMENT

Contractor agrees to accept all payments in United States currency via the State of Mississippi's electronic payment and remittance vehicle. The agency agrees to make payment in accordance with Mississippi law on "Timely Payments for Purchases by Public Bodies," which generally provides for payment of undisputed amounts by the Agency within forty-five (45) calendar days of receipt of invoice. Mississippi Code Ann. § 31-7-301 *et seq.*

25. E-VERIFICATION

If applicable, Contractor represents and warrants that it will ensure its compliance with the *Mississippi Employment Protection Act* and will register and participate in the status verification system for all newly hired employees. Mississippi Code Ann. §§ 71-11-1 and 71-11-3. Contractor agrees to provide a copy of each verification upon request of the MDE subject to approval by any agencies of the United States Government. Contractor further represents and warrants that any person assigned to perform services hereafter meets the employment eligibility requirements of all immigration laws. The breach of this agreement may subject Contractor to the following:

- (1) termination of this contract and exclusion pursuant to Chapter 15 of the Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations;
- (2) the loss of any license, permit, certification or other document granted to Contractor by an agency, department or governmental entity for the right to do business in Mississippi; or,
- (3) both. In the event of such cancellation/termination, Contractor would also be liable for any additional cost incurred by the Agency due to Contract cancellation or loss of license or permit to do business in the state.

26. ENTIRE AGREEMENT

This agreement, including all contract documents, represents the entire and integrated agreement between the parties hereto and supersedes all prior negotiations, representations or agreements, irrespective of whether written or oral. This agreement may be altered, amended, or modified only by a written document executed by the MDE and Contractor. Contractor acknowledges that it has thoroughly read all contract documents and has had the opportunity to receive competent advice and counsel necessary for it to form a full and complete understanding of all rights and obligations herein. Accordingly, this agreement shall not be construed or interpreted in favor of or against the MDE or Contractor on the basis of draftsmanship or preparation hereof.

27. EXCEPTIONS TO CONFIDENTIAL INFORMATION

Contractor and the State shall not be obligated to treat as confidential and proprietary any information disclosed by the other party ("disclosing party") which:

- (1) Is rightfully known to recipient prior to negotiations leading to this agreement, other than information obtained in confidence under prior engagements;
- (2) is generally known or easily ascertainable by nonparties of ordinary skill in the business of the customer;
- (3) is released by the disclosing party to any other person, firm, or entity (including governmental agencies or bureaus) without restriction;
- (4) is independently developed by the recipient without any reliance on confidential information;
- (5) is or later becomes part of the public domain or may be lawfully obtained by the State or Contractor from any nonparty; or,
- (6) is disclosed with the disclosing party's prior written consent.

28. EXCEPTIONS TO SOLICITATION

Offerors taking exception to any part of the solicitation shall clearly indicate such exceptions in its offer. Failure to indicate any exception will be interpreted as the Offeror's intent to comply fully with the requirements as written. Conditional or qualified offers, unless specifically allowed, shall be subject to rejection in whole or in part.

29. EXPENSES INCURRED IN THE PROCUREMENT PROCESS

All parties participating in the procurement process with regard to this solicitation shall bear their own costs of participation, pursuant to Section 1.4.4 of the *Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations*.

30. FAILURE TO DELIVER

In the event of failure of Contractor to deliver services in accordance with the contract terms and conditions, the MDE after due oral or written notice, may procure the services from other sources and hold Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies that the MDE may have.

31. FAILURE TO ENFORCE DOES NOT CONSTITUTE WAIVER

Failure by the MDE at any time to enforce the provisions of the contract shall not be construed as a waiver of any such provisions. Such failure to enforce shall not affect the validity of the contract or any part thereof or the right of the MDE to enforce any provision at any time in accordance with its terms.

32. FORCE MAJEURE

Each party shall be excused from performance for any period and to the extent that it is prevented from performing any obligation or service, in whole or in part, as a result of cause beyond the reasonable control and without the fault or negligence of such party and/or its subcontractors. Such acts shall include without limitation acts of God, strikes, lockouts, riots, acts of war, epidemics, governmental regulations superimposed after the fact, fire, earthquakes, floods or other natural disasters ("force majeure events"). When such a cause arises, Contractor shall notify the MDE immediately in writing of the cause of its inability to perform, how it affects its performance, and the anticipated duration of the inability to perform. All parties shall make reasonable efforts to minimize the impact of the force majeure event on contract performance. The MDE may exercise any rights it has under the contract which are available when neither party is in default. Delays in delivery or in meeting completion dates due to force majeure events shall automatically extend

such dates for a period equal to the duration of the delay caused by such events, unless the MDE determines it to be in its best interest to terminate this agreement.

33. INDEMNIFICATION

To the fullest extent allowed by law, Contractor shall indemnify, defend, save and hold harmless, protect, and exonerate the agency, its commissioners, board members, officers, employees, agents, and representatives, and the State of Mississippi from and against all claims, demands, liabilities, suits, actions, damages, losses, and costs of every kind and nature whatsoever including, without limitation, court costs, investigative fees and expenses, and attorney's fees, arising out of or caused by Contractor and/or its partners, principals, agents, employees and/or subcontractors in the performance of or failure to perform this agreement. In the State's sole discretion upon approval of the Office of the Mississippi Attorney General, Contractor may be allowed to control the defense of any such claim, suit, etc. In the event Contractor defends said claim, suit, etc., Contractor shall use legal counsel acceptable to the Office of the Mississippi Attorney General. Contractor shall be solely responsible for all costs and/or expenses associated with such defense, and the State shall be entitled to participate in said defense. Contractor shall not settle any claim, suit, etc. without the concurrence of the Office of the Mississippi Attorney General, which shall not be unreasonably withheld.

34. INDEPENDENT CONTRACTOR STATUS

Contractor shall, at all times, be regarded as and shall be legally considered an independent contractor and shall at no time act as an agent for the MDE. Nothing contained herein shall be deemed or construed by the MDE, Contractor, or any third party as creating the relationship of principal and agent, master and servant, partners, joint ventures, employer and employee, or any similar such relationship between the MDE and Contractor. Neither the method of computation of fees or other charges, nor any other provision contained herein, nor any acts of the MDE or Contractor hereunder creates or shall be deemed to create a relationship other than the independent relationship of the MDE and Contractor.

Contractor's personnel shall not be deemed in any way, directly or indirectly, expressly or by implication, to be employees of the MDE. Neither Contractor nor its employees shall, under any circumstances, be considered servants, agents, or employees of the MDE, and the MDE shall be at no time legally responsible for any negligence or other wrongdoing by Contractor, its servants, agents, or employees.

The MDE shall not withhold from the contract payments to Contractor any federal or state unemployment taxes, federal or state income taxes, Social Security tax, or any other amounts for benefits to Contractor. Further, the MDE shall not provide to Contractor any insurance coverage or other benefits, including Workers' Compensation, normally provided by the MDE for its employees.

35. INFORMATION DESIGNATED BY AGENCY AS CONFIDENTIAL

Any liability resulting from the wrongful disclosure of confidential information on the part of Contractor, or its subcontractor(s) shall rest with Contractor. Disclosure of any confidential information by Contractor or its subcontractor(s) without the express written approval of the MDE may result in the immediate termination of this agreement.

36. INFORMATION DESIGNATED BY CONTRACTOR AS CONFIDENTIAL

Any disclosure of those materials, documents, data, and other information which Contractor has designated in writing as proprietary and confidential shall be subject to the provisions of Mississippi Code Annotated §§ 25-61-9 and 79-23-1. As provided in the contract, the personal or professional services to be provided, the price to be paid, and the term of the contract shall not be deemed to be a trade secret, or confidential commercial or financial information.

37. INFRINGEMENT INDEMNIFICATION

Contractor warrants that the materials and deliverables provided to the MDE under this agreement, and their use by the MDE, will not infringe or constitute an infringement of any copyright, patent, trademark, or other proprietary right. Should any such items become the subject of an infringement claim or suit, Contractor shall defend the infringement action and/or obtain for the MDE the right to continue using such items without additional cost to the Agency. Should Contractor fail to obtain for the MDE the right to use such items, Contractor shall suitably modify them to make them non-infringing or substitute equivalent software or other items at Contractor's expense.

In the event the above remedial measures cannot possibly be accomplished, and only in that event, Contractor may require the MDE to discontinue using such items, in which case Contractor will refund to the MDE the fees previously paid by the MDE for the items the customer may no longer use, and shall compensate the MDE for the lost value of the infringing part to the phase in which it was used, up to and including the contract price for said phase. Said refund shall be paid within 10 business days of notice to the MDE to discontinue said use.

Scope of Indemnification: Provided that the MDE promptly notifies Contractor in writing of any alleged infringement claim of which it has knowledge, Contractor shall defend, indemnify, and hold harmless the MDE against any such claims, including but not limited to any expenses, costs, damages and attorney fees that a court finally awards for infringement based on the programs and deliverables provided under this agreement.

In the MDE's sole discretion, upon approval of the Office of the Mississippi Attorney General and the MDE, Contractor may be allowed to control the defense of any such claim, suit, etc. In the event Contractor defends said claim, suit, etc., Contractor shall use legal counsel acceptable to the Office of the Mississippi Attorney General and the MDE. Contractor shall be solely responsible for all costs and/or expenses associated with such defense, and the MDE shall be entitled to participate in said defense. Contractor shall not settle any claim, suit, etc. without the concurrence of the Office of the Mississippi Attorney General and the MDE, which shall not be unreasonably withheld.

38. LEGAL AND TECHNICAL SUPPORT

Contractor shall utilize its knowledge and understanding of applicable legal standards and comply with recognized professional standards and generally accepted measurement principles applicable to assessments and uses of the type described in this contract, including but not limited to standards relating to validity and reliability. Contractor shall consult with the MDE concerning its implementation of the requirements of this section. In the event of a challenge in which the validity or reliability of the use of an assessment developed under this contract is an issue (other than a challenge based on infringement of copyright or other proprietary rights of a third party), Contractor shall cooperate with the MDE and/or the State of Mississippi in the defense of the assessment and shall provide reasonable technical and legal support with regard to Contractor's activities under this contract without additional charges to the MDE or the State.

39. MODIFICATION OR RENEGOTIATION

The parties agree to renegotiate the agreement in good faith if federal and/or state revisions to any applicable laws or regulations make changes in this agreement necessary. This agreement may be modified only by written agreement signed by the parties hereto and approval by the SBE and Public Procurement Review Board, if required.

40. MINOR INFORMALITIES AND IRREGULARITIES

The MDE has the right to waive minor defects or variations of a [bid, proposal, qualification, application] from the exact requirements of the specifications that do not affect the price, quality, quantity, delivery, or performance of the services being procured and if doing so does not create

an unfair advantage for any offeror. If insufficient information is submitted by an offeror for the MDE to properly evaluate the offer, the MDE has the right to require such additional information as it may deem necessary after the submission deadline, provided that the information requested does not change the price, quality, quantity, delivery or performance time of the services being procured and such a request does not create an unfair advantage for any offeror. (*Information requested may include, for example, a copy of business or professional license, or a work schedule.*)

41. NO LIMITATION OF LIABILITY

Nothing in this agreement shall be interpreted as excluding or limiting any tort liability of Contractor for harm arising out of the Contractor's or its subcontractors' performance under this agreement.

42. ORAL STATEMENTS

No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in this contract. All modifications to the contract shall be made in writing by the MDE, agreed to by Contractor and approved by the SBE and Public Procurement Review Board, if required.

43. PAYMODE

Payments by the MDE using the state's accounting system shall be made and remittance information provided electronically as directed by the State and deposited into the bank account of Contractor's choice. The MDE may, at its sole discretion, require Contractor to electronically submit invoices and supporting documentation at any time during the term of this Agreement. Contractor understands and agrees that the Agency is exempt from the payment of Mississippi taxes. All payments shall be in United States currency.

44. PRICE ADJUSTMENT

- (1) **Price Adjustment Methods.** Any adjustments in contract price, pursuant to a clause in this contract, shall be made in one or more of the following ways:
- a. must be stated in the solicitation describing the method in which any price adjustment will be calculated, the triggering event which makes the price adjustment clause to be enacted.
 - b. by agreement on a fixed price adjustment before commencement of the Additional performance;
 - c. by unit prices specified in the contract;
 - d. by the costs attributable to the event or situation covered by the clause, plus appropriate profit or fee, all as specified in the contract; or,
 - e. by the price escalation clause.
- (2) **Submission of Cost or Pricing Data.** Contractor shall provide cost or pricing data for any price adjustments.

45. PRICE CERTIFICATION

Any Offeror submitting a response to this solicitation agrees and certifies that it will honor its pricing and all terms and conditions herein for the duration of the contract term described in this solicitation. By submitting a response hereto, Offeror agrees to accept a contract pursuant to the requirements of

Section 14.15 of the Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations if so requested by the procuring Agency.

46. PROCUREMENT REGULATIONS

The contract shall be governed by the applicable provisions of the *Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations*, a copy of which is available on the Mississippi Department of Finance and Administration's website (www.dfa.ms.gov). Any Offeror responding to a solicitation for personal and professional services and any contractor doing business with a state Agency is deemed to be on notice of all requirements therein.

47. PROPERTY RIGHTS

Property rights do not inure to any [Bidder, Offeror] until such time as services have been provided under a legally executed contract. No party responding to this [IFB, RFP, RFQ] has a legitimate claim of entitlement to be awarded a contract or to the provision of work thereunder. The MDE is under no obligation to award a contract and may terminate a legally executed contract at any time.

48. RECOVERY OF MONEY

Whenever, under the contract, any sum of money shall be recoverable from or payable by Contractor to the MDE, the same amount may be deducted from any sum due to Contractor under the contract or under any other contract between Contractor and the MDE. The rights of the MDE are in addition and without prejudice to any other right the MDE may have to claim the amount of any loss or damage suffered by the MDE on account of the acts or omissions of Contractor.

49. RENEWAL OF CONTRACT

The contract may be renewed at the discretion of the MDE for the term specified in the solicitation under the same prices, terms, and conditions as in the original contract. The total number of renewal years permitted shall not exceed the term specified in the solicitation.

50. CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES

By executing the contract the contractor represents that it has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract. If contractor cannot make such representation, a full and complete explanation shall be submitted in writing to MDE prior to contract execution.

51. REPRESENTATION REGARDING GRATUITIES

Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of [Agency] a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. [Offeror, Contractor] further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by offeror. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law

52. REQUIRED PUBLIC RECORDS AND TRANSPARENCY

Upon execution of a contract, the provisions of the contract which contain the personal or professional services provided, the unit prices, the overall price to be paid, and the term of the contract shall not be deemed to be a trade secret or confidential commercial or financial information pursuant to Mississippi Code Annotated § 25-61-9(7). The contract shall be posted

publicly on www.transparency.ms.gov and shall be available for at the Agency for examination, inspection, or reproduction by the public. The offeror acknowledges and agrees that the MDE and this contract are subject to the Mississippi Public Records Act of 1983 codified at Mississippi Code Annotated §§ 25-61-1, et seq. and its exceptions, Mississippi Code Annotated § 79-23-1, and the *Mississippi Accountability and Transparency Act of 2008*, codified at Mississippi Code Annotated §§ 27-104-151, et seq.

53. RIGHT TO AUDIT

Contractor shall maintain such financial records and other records as may be prescribed by the MDE or by applicable federal and state laws, rules, and regulations. Contractor shall retain these records for a period of three years after final payment, or until they are audited by the MDE, whichever event occurs first. These records shall be made available during the term of the contract and the subsequent three-year period for examination, transcription, and audit by the Mississippi State Auditor's Office, its designees, or other authorized bodies.

54. RIGHT TO INSPECT FACILITY

The MDE may, at reasonable times, inspect the place of business of a Contractor or any subcontractor which is related to the performance of any contract awarded by the MDE.

55. SEVERABILITY

If any part of this agreement is declared invalid or unenforceable, such invalidity or unenforceability shall not affect any other provision of the agreement that can be given effect without the invalid or unenforceable provision, and to this end the provisions hereof are severable. In such event, the parties shall amend the agreement as necessary to reflect the original intent of the parties and to bring any invalid or unenforceable provision in compliance with applicable law.

56. STATE PROPERTY

Contractor will be responsible for the proper custody and care of any state-owned property furnished for Contractor's use in connection with the performance of this agreement. Contractor will reimburse the state for any loss or damage, normal wear and tear excepted.

57. STOP WORK ORDER

The MDE may, by written order to Contractor at any time, require Contractor to stop all or any part of the work called for by this contract. This order shall be for a period of time specified by the MDE. Upon receipt of such an order, Contractor shall forthwith comply with its terms and take all reasonable steps to minimize any further cost to the MDE. Upon expiration of the stop work order, Contractor shall resume providing the services which were subject to the stop work order, unless the MDE has terminated that part of the agreement or terminated the agreement in its entirety. The MDE is not liable for payment for services which were not rendered due to the stop work order.

58. TERMINATION

Termination for Convenience. The MDE may, when the interests of the Agency so require, terminate this contract in whole or in part, for the convenience of the Agency. The MDE shall give written notice of the termination to Contractor specifying the part of the contract terminated and when termination becomes effective. Contractor shall incur no further obligations in connection with the terminated work and on the date set in the notice of termination Contractor will stop work to the extent specified. Contractor shall complete the work not terminated by the notice of termination and may incur obligations as are necessary to do so.

Termination for Default. If the MDE gives the Contractor a notice that the personal or professional services are being provided in a manner that is deficient, the Contractor shall have 30 days to cure the deficiency. If the Contractor fails to cure the deficiency, the MDE may terminate the contract for default and the Contractor will be liable for the additional cost to the MDE to procure the

personal and professional services from another source. Termination under this paragraph could result in Contractor being excluded from future contract awards pursuant to Chapter 15 of the Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. Any termination wrongly labelled termination for default shall be deemed a termination for convenience.

59. TERMINATION UPON BANKRUPTCY

This contract may be terminated in whole or in part by the MDE upon written notice to Contractor, if Contractor should become the subject of bankruptcy or receivership proceedings, whether voluntary or involuntary, or upon the execution by Contractor of an assignment for the benefit of its creditors. In the event of such termination, Contractor shall be entitled to recover just and equitable compensation for satisfactory work performed under this contract, but in no case shall said compensation exceed the total contract price.

60. THIRD PARTY ACTION NOTIFICATION

Contractor shall give the customer prompt notice in writing of any action or suit filed, and prompt notice of any claim made against Contractor by any entity that may result in litigation related in any way to this agreement.

61. TRADE SECRETS, COMMERCIAL AND FINANCIAL INFORMATION

It is expressly understood that Mississippi law requires that the provisions of this contract which contain the commodities purchased or the personal or professional services provided, the price to be paid, and the term of the contract shall not be deemed to be a trade secret or confidential commercial or financial information and shall be available for examination, copying, or reproduction.

62. UNSATISFACTORY WORK

If, at any time during the contract term, the service performed, or work done by Contractor is considered by the Agency to create a condition that threatens the health, safety, or welfare of the citizens and/or employees of the State of Mississippi, Contractor shall, on being notified by the Agency, immediately correct such deficient service or work. In the event Contractor fails, after notice, to correct the deficient service or work immediately, the Agency shall have the right to order the correction of the deficiency by separate contract or with its own resources at the expense of Contractor.

End of this page

Appendix C - References

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Appendix D - REFERENCE SCORE SHEET

Applicant Name:
Reference Name:
Person Contacted, Title/Position:
Date/Time Contacted:
Service From/To Dates:

Able to provide services when you called?	Yes	No
Satisfied with the services provided? If no, please explain.	Yes	No
Applicant easy to work with in scheduling services?	Yes	No
Was the service completed on time and within budget?	Yes	No
Applicant listened when issues were presented to resolve conflict? (If never had an issue, please check here ____.)	Yes	No
Would you hire them again?	Yes	No
Would you recommend them?	Yes	No

Potential applicant must have a minimum of 6 “yes” answers on the questions above from two references (total of 12 “yes” answers) to be considered responsible and to be considered.

Score: Pass/Fail

Do you have any business, professional or personal interest with the applicant? If yes, please explain.	Yes	No
---	-----	----

A “yes” to the above question may result in an automatic disqualification of the provided reference; therefore, resulting in a score of zero as responses to previous questions become null and void.

Notes:

Program Director: _____
Signature
Title
Date

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](#) under “Public Notice” Request for Applications, Qualifications, and Proposals section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: *If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.*

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor’s bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The Offeror represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s bid or proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: _____

Title: _____

Signature: _____ Date: _____

Modifications or additions to any portion of this document may cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

_____ Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

_____ Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not ()** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

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Appendix I – COST DATA/BUDGET

The vendor should refer to [Section 2.3 Deliverables](#) and provide line-item cost detail for all deliverables identified.

Attach Excel spreadsheet if necessary.

PUBLIC NOTICE

Proof of publication in the newspaper, procurement portal, website, and direct solicitation of 3 offerors; written determination if advertising less than 30 days prior to submission deadline (if applicable)

Applicable: YES NO

AFFIDAVIT OF PUBLICATION

Monique Corley
Accounts Payable
Ms Department Of Education
Po Box 771
Jackson MS 39205-0771

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department
of Education
Strategic Planning and
Performance Scorecard
RFX No. 3120003030
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he/she is a Legal Advertising Representative of The Clarion-Ledger, a newspaper as defined and prescribed in Sections 13-3-31 and 13-3-32, of the Mississippi Code of 1972, as amended, who, being duly sworn, states that the notice, a true copy of which is hereto attached, to be issues of said newspapers editions date as follows:

01/10/2025, 01/17/2025

That said newspaper was regularly issued and circulated on those dates and that the fees charged are legal.

Sworn to and subscribed before on 01/17/2025

Legal Clerk

Notary, State of WI, County of Brown

My commission expires

Publication Cost: \$67.23
Tax Amount: \$0.00
Payment Cost: \$67.23
Order No: 10925257 # of Copies:
Customer No: 1010899 1
PO #:

THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.

NICOLE JACOBS
Notary Public
State of Wisconsin

SEARCH

Agency	Smart Number	RFx Number	Description	Status	Advertised Date	Submission Date	RFx Opening Date	
MS DEPT OF EDUCATION	1201-25-R-RFPR-00012	3120003047	Major Procurement PERSONNEL SERVICES NON-IT RFP Solicitation for Strategic Plan Services Attachment - RFP Final (Reissue 1.10.25)	Open	01/10/2025	02/05/2025	02/05/2025	View Contact

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Resources

- MS.GOV
- MS DEPT of Information Technology Services (ITS)
- Mississippi's Chosen Payment Network
- Paymode
- MS DFA: Bureau of Building
- MS DFA: Office of Purchasing
- MS DFA: Office of Personal Service Contract Review
- Mississippi Management and Reporting System
- Statewide Contract Item Catalog

SOLE SOURCE

CONTRACT INTENT TO AWARD

CONTRACT AWARD

- Request for Quotes – Cafeteria Plan Administrator
 - Notice of Contract Award

REQUEST FOR PROPOSALS/QUALIFICATIONS/ APPLICATIONS

CONTRACTS

- RFP – Strategic Planning and Performance Scorecard
 - Amendment No. 1
 - Amendment No. 2
 - Notice of Cancellation
- RFP – Strategic Planning and Performance Scorecard – REISSUE

TECHNOLOGY

GRANTS

INVITATION FOR BIDS

Search

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MDE Bid Announcements

[MDE Program Offices](#)

[Purchasing Notes](#)

[Rules and Regulations](#)

[Transparency – Mississippi.gov](#)

RFP for Strategic Planning and Performance Scorecard RFX No. 3120003047 - Reissue



Leigh Washington

To

Bcc: ● [Worfolk, Thomas](#); ● [Francois, Trae](#); ● [Cori Egan](#); ● [Dr. Courtney Hayes](#); ● [Carly O'Connell](#); ● [vwells@studereducation.com](#)

This is the most recent version, but you made changes to another copy. [Click here to see the other versions.](#)
You forwarded this message on 1/15/2025 8:17 AM.



updated rfp.strat.plan.2024 1.7.25 FINAL2.pdf
529 KB

Reply Reply All Forward

Fri 1/10/2025 12:51 PM

Hello,

Please see attached for your review and consideration.

Thanks,

Leigh

LEIGH A. WASHINGTON, CMPA, Procurement Supervisor

Office of Procurement

601-359-5716 | mdek12.org

REQUEST FOR RECONSIDERATION OF THE TERMS OF THE SOLICITATION

Any requests received and all related correspondence, the Agency response, proof of distribution of the Agency response directly to bidders, on website, and on procurement portal; memorandum regarding reasonable time between response to request and submission deadline (if applicable)

Applicable: YES NO

Type text here

LETTERS OF INTENT

A copy of all letters of intent received by the Agency

Applicable: YES NO

PRE-SUBMISSION CONFERENCE

Record of attendees, transcript or audio/video recording of the conference, documents provided to conference attendees, amendments issued to the RFP/RFQ

Applicable: YES NO

RFP OR RFQ AMENDMENTS (INCLUDING Q&A)

*All amendments issued; proof of distribution directly to offerors,
on website, and on procurement portal; memorandum
regarding reasonable time for distribution (if applicable)*

Applicable: YES NO



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: *This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Authorized Signature

Date

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: _____

Title: _____

Signature: _____ Date: _____



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6**: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Authorized Signature

Date

Printed Name

Agency	Smart Number	RFx Number	Description	Status	Advertised Date	Submission Date	RFx Opening Date	
MS DEPT OF EDUCATION	1201-25-R-RFPR-00012-V05	3120003047	Major Procurement PERSONNEL SERVICES NON-IT RFP Solicitation for Strategic Plan Services Attachment - Amendment No. 1 Attachment - Amendment No. 2 Updated Attachment - RFP Final (Reissue 1.10.25)	Open	01/10/2025	02/05/2025	02/05/2025	View Contact

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REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

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- [RFP – Strategic Planning and Performance Scorecard](#)
 - [Amendment No. 1](#)
 - [Amendment No. 2](#)
 - [Notice of Cancellation](#)
- [RFP – Strategic Planning and Performance Scorecard – REISSUE](#)
 - [Amendment No. 1](#)
 - [Amendment No. 2](#)

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RFP for Strategic Planning and Performance Scorecard RFX No. 3120003047 - Reissue



Leigh Washington

To

Bcc: ● [Worfolk, Thomas](#); ● [Francois, Trae](#); ● [Cori Egan](#); ● [Dr. Courtney Hayes](#); ● [Carly O'Connell](#); ● [vwells@studereducation.com](#)

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Please see attached for your review and consideration.

Thanks,

Leigh

LEIGH A. WASHINGTON, CMPA, **Procurement Supervisor**

Office of Procurement

601-359-5716 | mdek12.org

RFP for Strategic Planning and Performance Scorecard RFX No. 3120003047 - Reissue



Leigh Washington

To

Bcc ● [Worfolk, Thomas](#); ● [Francois, Trae](#); ● [Cori Egan](#); ● [Dr. Courtney Hayes](#); ● [Carly O'Connell](#); ● [vwells@studereducation.com](#)

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Hello,

Please see attached for your review and consideration.

Thanks,

Leigh

LEIGH A. WASHINGTON, CMPA, **Procurement Supervisor**

Office of Procurement

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MISSISSIPPI

RECEIPT OF PROPOSALS OR QUALIFICATIONS

Proof of date and time all proposals or qualifications were received; written determination regarding consideration of late proposals or qualifications (if applicable)

Applicable: YES NO

REGISTER OF PROPOSALS: Strategic and Planning Scoreboard - RFX #3120003047

DUE DATE OF PACKETS: February 5, 2025

TIME PACKETS DUE: 2:00 p.m.

#	Date Received	Name of Offeror/Recipient	Method of Delivery	Response Received by	Received Late? (Record time for LATE submissions)
1	2/3/2025	Martin's Career Coaching & Learning Little People	FedEX	L. Washington	NO
2	2/3/2025	MGT Impact Solutions	MAGIC	L. Washington	NO
3	2/3/2025	Engage Learning, LLC	MAGIC	L. Washington	NO
4	2/5/2025	Public Consulting Group	MAGIC	L. Washington	NO
5	2/5/2025	WestEd	MAGIC	L. Washington	NO
6	2/5/2025	Academic Development Institute	MAGIC	L. Washington	NO
7	2/5/2025	Cognia	MAGIC	L. Washington	NO
8	2/5/2025	Berry Dunn McNeil Parker	MAGIC	L. Washington	NO
9	2/5/2025	LMcIntosh Career Consulting	MAGIC	L. Washington	NO
10	2/5/2025	The Boston Consulting Group	MAGIC	L. Washington	NO
11	2/5/2025	Learner's Edge	MAGIC	L. Washington	NO
12	2/5/2025	Lumen Impact	MAGIC	L. Washington	NO
13	2/5/2025	Studer Education	MAGIC	L. Washington	NO
14	2/5/2025	James Stephen Price	MAGIC	L. Washington	NO
15	2/5/2025	Research Triangle Institute	MAGIC	L. Washington	NO
16	2/5/2025	Anlar LLC	MAGIC	L. Washington	NO
17	2/5/2025	Education First Consulting	MAGIC	L. Washington	NO
18	2/5/2025	Advanced Learning Partnerships	MAGIC	L. Washington	NO
19	2/5/2025	ILO Group LLC	MAGIC	L. Washington	NO

PROPOSAL OR QUALIFICATION ACCEPTANCE

Documentation regarding the modification, withdrawal, or confirmation of proposals or qualifications and/or any minor informalities waived by the Agency (if applicable)

Applicable: YES NO

ALL PROPOSALS OR QUALIFICATIONS RECEIVED

Any requests received and all related correspondence, the Agency response, proof of distribution of the Agency response directly to bidders, on website, and on procurement portal; memorandum regarding reasonable time between response to request and submission deadline (if applicable)

Applicable: YES NO

Appendix A – Proposal Cover Sheet

Company/Name: Academic Development Institute

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Pam Sheley, Executive Director
Mailing Address	121 N. Kickapoo Street
City, State, Zip	Lincoln, IL 62656
Telephone:	217-732-6462
E-Mail Address:	psheley@adi.org

Please identify the Office/Branch which will provide services for the MDE if different from above:


Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? 3100007275
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: 02/04/25



Mississippi Department of Education

Strategic Planning Scorecard

RFX#3120003047

Submitted on February 5, 2025, By

Academic Development Institute

Pam Sheley, Executive Director

121 N. Kickapoo St. Lincoln, IL 62656

1-800-759-1495

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Mississippi Department of Education

Strategic Planning Scorecard

RFX#3120003047

Introduction and Overview

The Academic Development Institute (ADI) is pleased to provide the following proposal for strategic planning and performance management services to be provided to the Mississippi Department of Education (MDE). ADI is a non-profit, tax-exempt corporation established in 1984 to assist families, schools, and communities with children's academic and personal development. ADI is governed by a national board of directors and is advised by an international advisory board associated with ADI's scholarly *School Community Journal*. ADI is based in Lincoln, Illinois, with an extension office in East St. Louis, Illinois. More information can be accessed at www.adi.org

Component 1 – Plan of Action

Need

Nationwide there are increasing demands on State Education Agencies (SEA) while at the same time funding to address education during the pandemic winds down. Local education agencies (LEA) are cutting budgets and looking to their SEA for help. The changing education and workforce landscape will continue to bring unprecedented demands to SEAs. Those demands require shifts in **operational philosophy** (moving from an emphasis on regulatory functions to leadership in reform and support of district and school transformation), an enhanced **knowledge base** (e.g., evidence-based instructional practices), and augmented human and organizational **capacities**. Although there are opportunities to innovate policies and practices, taking advantage of those opportunities depends on the transformation of SEAs to build organizational capacities to become more strategic in management of human and material resources. Internal capacity needs (primarily organizational and human) that are common across SEAs:

- renewed and well-articulated statement of **organizational direction** aligned to performance measures
- an internal **organizational culture** of continuous growth and improvement to respond nimbly to changing needs and higher demands
- **organizational structures** that complement the work functions of the agency and facilitate productive collaboration across divisions and units

- an **external structure and process** to authentically engage stakeholders as partners in creating and implementing of the organization’s direction.

Key personnel designated for this project have published three practice guides for an SEA to implement strategic performance management (SPM) and have provided intensive technical assistance to ten SEAs (or similar agency) from 2015 to today, documenting the challenges (e.g., significant shift in mindset and work practices for personnel) SEAs confront when tackling major, systematic implementation of performance management aligned to new strategic directions (vision, mission, goals, strategies, milestones, actions, and performance measures). Strategic Performance Management is a capacity-building process for SEAs to organize themselves more intentionally and efficiently to better support LEAs and schools in improving student outcomes. An external evaluation of SPM in 2019 found that participating SEAs made improvements in integration and efficiency of agency operations. “Helping staff work purposefully and collaboratively toward a set of agency goals is seen as a valuable contribution to state agency capacity” (Hildreth & Turnbull, p. 10).

Project Goal

The goal of the project is to assist the MDE in setting a strategic direction that is aligned to the mission, goals, and evolving priorities with specific performance indicators and means to routinely track progress and use progress data to adjust as needed. Success of the project will be determined by meeting the contract deliverables and measuring the impact of ADI’s services in building MDE’s capacity to meet the needs of students, their families, and communities throughout the state.

Our approach brings effective practices of business and education together to map a direction based on current and future trends and needs. Reviewing trend data includes workforce, economic, environment, technology trends gained from industry research, so a SEA’s direction and its work can be leveraged to address current and future challenges as the education landscape changes. Our approach takes the SEA from where it is to where it wants to be, customizing tools and resources to meet the needs of all stakeholders and assist the SEA in sustaining growth and improvement efforts.

Objective 1. MDE and ADI have a joint approved Project Plan to manage the strategic direction that is aligned to the mission, goals, and evolving priorities with specific performance indicators and means to routinely track progress and use progress data to adjust as needed.

Intended effect: MDE and ADI have clear roles, responsibilities, and a communication process to ensure the project is completed on time and all deliverables are met.

Evidence: Project timelines are met, activities have been completed, and deliverables are completed.

<p>Objective 2. Identified stakeholders have engaged in the planning and implementation development through direct participation, surveys, or focus groups.</p> <p>Intended effect: MDE stakeholders represented voices throughout the state, especially those who have been historically marginalized.</p> <p>Evidence: Survey responses and session evaluations from stakeholders indicate at least 75% of stakeholders agree the process was inclusive and meaningful.</p>
<p>Objective 3. MDE created a strategic direction informed by an Environmental Scan which included stakeholder input.</p> <p>Intended effect: The MDE strategic plan addresses current and future needs and challenges based on internal and external data.</p> <p>Evidence: 95% of recommendations from the Environmental Scan are aligned in the strategic direction and performance indicators.</p>
<p>Objective 4: MDE has an approved strategic direction that is aligned to the mission, goals, and evolving priorities with specific performance indicators and means to routinely track progress and use progress data to adjust as needed.</p> <p>Intended effect: MDE leaders and staff have shared ownership of the plan and see the connection between their role and the plan.</p> <p>Evidence: Review of plan using a rubric that includes alignment analysis; 90% of MDE leaders and staff who participated in the strategic planning and performance management indicate shared ownership of the plan and a clear connection of their role with the strategic direction.</p>
<p>Objective 5: MDE has created a performance cycle that includes routine progress monitoring, reporting, and using progress data to timely address challenges or performance issues.</p> <p>Intended effect: MDE leaders and staff have progress data to inform performance, address performance issues, and regularly use progress data to adjust and engage in continuous planning and implementation.</p> <p>Measure: 90% of MDE leaders and staff who participated in the strategic planning and performance management indicate shared ownership of the plan, they see a connection of their role and the strategic direction, and are reporting progress and using data to make adjustments.</p>

Plan of Action: Phase 1: Strategic Planning and Performance Management

Project Initiation and Planning

If awarded, ADI Program Director (Dr. Allison Layland) will schedule an in-person meeting with the MDE to understand the current context, clarify objectives and deliverables, identify roles and responsibilities, and create a timeline. From there we will co-develop a Project Work Plan with milestones, actions, timeline, and deliverables and approved by MDE. A communication plan will also be developed so there is a seamless flow of information back and forth between MDE, ADI, and other key stakeholders. It is critical that we identify the various stakeholder groups and needed messaging based on each group’s role and need. We have found that clear,

concise communication on a routine basis builds trust, transparency, and values all voices, especially those who have been marginalized.

A schedule to conduct focus groups, interviews, and administer surveys will be established. Stakeholders focus groups and interviews will be conducted in person to ensure participants feel safe to share their thoughts and suggestions. Other tools and resources to be developed or adapted for MDE include, but not limited to,

- Stakeholder survey
- Interview protocols
- Environmental Scan protocol
- Data collection tools

Key documents and location will be identified and include not only the documents and data shared in the RFP (strategic plans, performance data, policies, procedures, and communication protocols), but also education, economic, workforce, environmental, and technological trend data provided by ADI from other sources.

Environmental Scan and Data Collection

The ADI team will facilitate the review of existing documents, trend data, and other relevant information related to the state. A SWOT analysis will be conducted to identify the strengths, weaknesses, opportunities, and threats using an asset-based approach and an equity lens. Prioritizing the strengths and opportunities while also addressing gaps and mitigating the threats that are within MDE's influence is critical, as a SEA cannot do everything at once. The strategic direction and work allow for additional initiatives, projects, and processes to be added as context and needs change.

A summary of the data including the analysis of SWOT findings, document reviews, stakeholders input, and the environmental scan with recommendations will be provided to MDE and used to inform the development of MDE's strategic direction.

Strategic Planning and Performance Management

The ADI Team will use an inclusive approach to developing MDE's strategic direction and work plan. The people carrying out the plan need to be involved in creating the plan. Internal and external stakeholders will be identified for each stage of the planning and performance work. Figure 1 depicts the planning and performance cycle. The cycle can be modified based on the current context of MDE. For example, there may not be a need to analyze structures and functions if there has been recent reorganization or the ability to reorganize is limited.

- Setting a strategic direction
- Operationalize the direction to ensure the organization’s structure and functions align and support the direction
- Design actionable work with timelines, outputs, resources, and responsible people and teams
- Create and implement a performance and innovation cycle with routine reporting and using data to adjust and innovate.

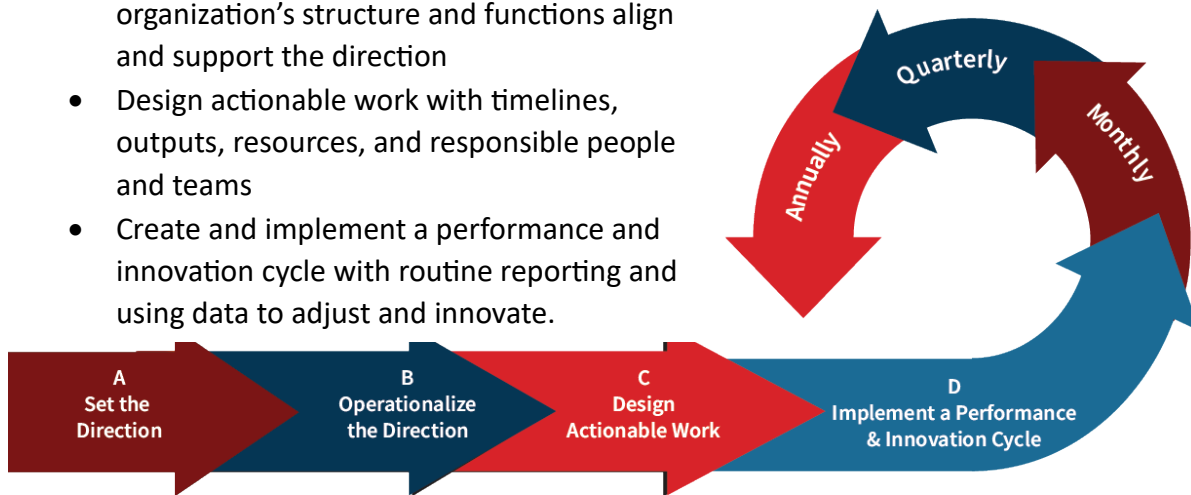


Figure 1. Strategic Performance Management

Set the Direction

The first step is revisiting the SEA’s vision, mission, and values to determine if they are relevant now and into the future. Through discussions, these will be either reaffirmed or revised. Next is the establishment of student-focused and organization goals aligned to the vision, mission, and values. Strategies are informed by the environment scan findings and recommendations. Strategies are identified and each is stated as a theory of action which informs performance measures. Performance measures are identified for both the change in adult professional practice and impact on student learning or behavior (see Figure 2). Measuring the changes in adult practice is critical because we will not see a change in student learning until we change adult practices.¹ Figure 3 displays the steps to creating a strategic direction.



Figure 2. Strategy as a Theory of Action

¹ Redding, S., & Layland, A. (2023). Practice-focused collaboration. ADI.

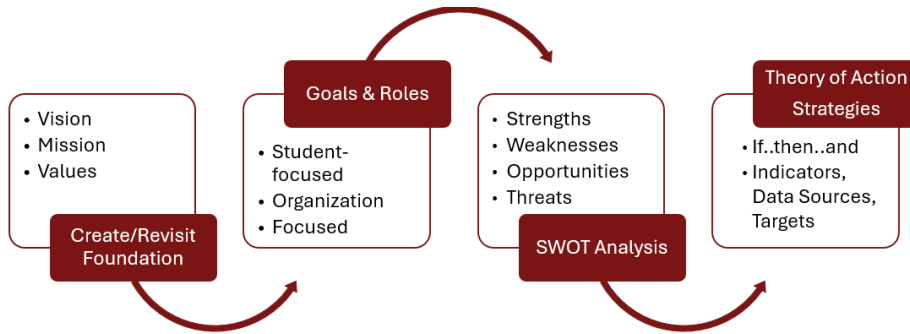


Figure 3. Set a Strategic Direction

Operationalize the Direction

More times than not, SEAs, districts, and schools plan to spend money. For example, when a school develops its school improvement plan, it is often after they know their budgets, so they plan to spend. A shift needs to be made where the plan or strategic direction informs how the organization leverages its resources including people to effectively implement the plan. During this step, we examine current functions, projects, and programs and determine what supports the strategies, what is not aligned and why, and identify gaps and what to stop doing.

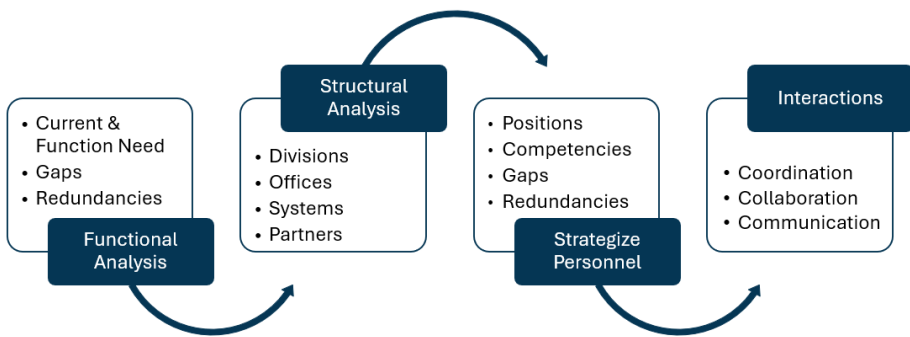


Figure 4. Operationalize the Direction

Design Actionable Work

Annual milestones and detailed actions with timelines, outputs, resources, and responsible people are developed by the people and partners who will carry out the work.

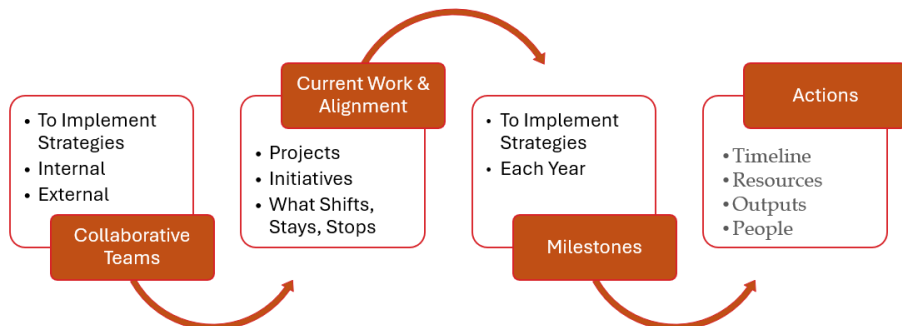


Figure 5. Design Actionable Work

Performance Scorecard Development

Performance indicators are developed as goals and strategies are developed. The performance indicators provide a check, for if the goal or strategy cannot be measured, it needs to be revised. The measures provide implementation data (did we do what we planned to do) and impact data (what is the change in professional practice at the SEA, district, and schools and the impact on student learning or behavior).

The ADI team will work with MDE to design a scorecard and website to report progress and keep all stakeholders informed. ADI has developed a web-based performance management tool that provides reports showing progress in charts and tables. This can be adapted for use by MDE, should they choose to use it. If there is another tool MDE prefers, the Team will work with identified leads to ensure data collection is easy and transparent reporting can occur.

Deliverables for Phase 1 include

- Project Work Plan
- Communication Plan
- SWOT analysis and Environmental Scan Report with recommendations
- Stakeholder engagement plan with protocols
- Draft Strategic Plan and Performance Scorecard
- Final Strategic Plan and Performance Scorecard with presentation and training materials.

Plan of Action: Phase 2: Implementation, Monitoring, and Reporting

Implementation

Leaders in both education and business report frustration with implementing strategic plans. It is estimated that 60 to 90% of strategic plans are never fully launched.² The reasons range from lack of commitment and buy-in of all staff, to not understanding the problem, or designing strategies that go beyond an organization's capacity. Implementing a performance cycle with routine reporting and use of data has made a difference when the cycle occurs in a culture of support rather than blame. Designing an implementation map with the data collection tools keeps the plan on track and provides timely information to address challenges and problems when they occur. The ADI team will provide guidance and assistance in building the MDE performance cycle with regular reporting, clear roles, and using data to make needed adjustments. The Team will also provide training and coaching during initial implementation as people are making the shift to accountability with support. This is critical to plan implementation and encourages people to honestly assess where the work is, what is behind schedule, and what is the root cause of the delays. The leadership team uses the data to

² Olsen, A. B. (2022). 4 reasons strategies fail. Harvard Business Review.

identify and address problems (e.g., procurement bottleneck, inequitable resources, lack of collaboration) to get work back on track. Without this honest assessment and reporting, the SEA has a false sense of security, and it will not see the anticipated impact on adults or students.

Monitor and Report

Monitoring and reporting protocols will be created based on anticipated users and piloted to ensure the protocols are useful, relevant, and match identified users or stakeholders. ADI has included reports in the web-based platform and the reports can be modified to meet MDE’s needs and uses. Figure 6 depicts the performance cycle.

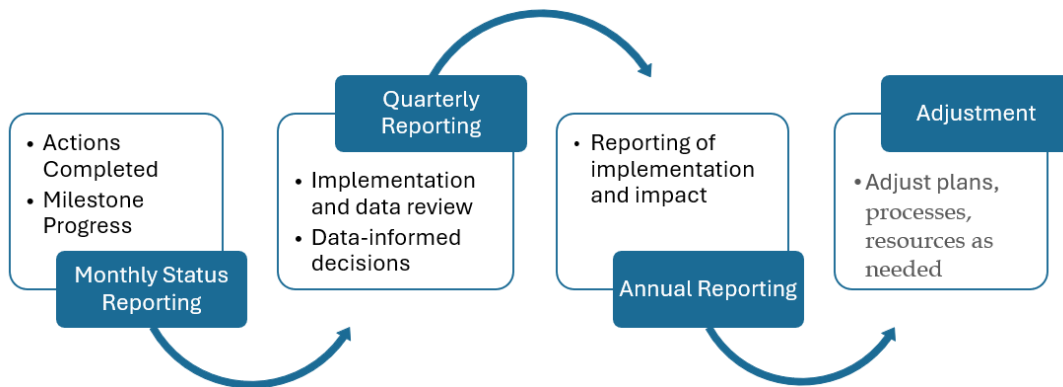


Figure 6. Performance and Innovation Cycle

Deliverables in Phase 2 include

- Performance Cycle plan with reporting processes, procedures, and timelines
- Monitoring and reporting protocols and examples of expected reporting detail
- Training on using performance data to determine actions needed to address delays
- Sample protocol to recognize and celebrate success

Table 1 details the activities, timelines, and deliverables for both Phase 1 and Phase 2. The timeline is suggested and will be finalized with MDE.

Table 1: Suggested Implementation Timeline

Project Goal. The goal of the project is to assist the MDE in setting a strategic direction that is aligned to the mission, goals, and evolving priorities with specific performance indicators and means to routinely track progress and use progress data to adjust as needed.

Objective 1. MDE and ADI have a joint approved Project Plan to manage the strategic direction that is aligned to the mission, goals, and evolving priorities with specific performance indicators and means to routinely track progress and use progress data to adjust as needed.

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1. Kickoff-Meeting (On-site – 1 day)												
2. Develop an approvable Project Work Plan												
3. Develop communication process, schedule, and roles and responsibilities												
4. Identify list of internal and external stakeholders that are representative of the state, its students, families, and communities												

Objective 2. Identified stakeholders have engaged in the planning and implementation development through direct participation, surveys, or focus groups.

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1. Develop schedule for focus groups and interviews												
2. Conduct focus groups and interviews (On-site – 5 days)												
3. Develop survey for identified audiences who will complete survey and not engage in interviews or focus groups												

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
4. Administer survey with reminders												
5. Analyze stakeholder input												

Objective 3. MDE created a strategic direction informed by an Environmental Scan which included stakeholder input.

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1. Gather and review existing documents and data including strategic plans, performance data, and other relevant information												
2. Summarize document review												
3. Gather and conduct a comprehensive environmental scan of the current education landscape, including education, economic, workforce, environmental, and technology trends impacting the state												
4. Summarize environmental scan and findings												
5. Identify participants for the SWOT analysis and prepare data packets												
6. Facilitate SWOT analysis using collected documents and data (On-site – 3 days)												
7. Summarize key findings from SWOT												
8. Facilitate development of setting a strategic direction (revisiting vision, mission, values; set strategic goals based on document, data, and scan results, and create goal performance measures) (On-site - 2 days)												

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
9. Identify and prioritize strategies and define performance measures (change in adult practices and impact on student learning) (On-site – 2 days)												
10. Conduct structural and functional analysis and review of current work to determine alignment, performance, and gaps (On-site – 2 days)												
11. Facilitate the design of actionable work with actions, timelines, resources, outputs, and responsible people/teams (On-site – 2 days)												
12. Draft the strategic plan												
13. Conduct stakeholder workshops to gather feedback on draft strategic plan with performance scorecard												
14. Finalize strategic plan based on stakeholder feedback and prepare summary of feedback use to share with stakeholders												
15. Assist MDE in presenting the strategic plan and scorecard to the board for approval												

Objective 4: MDE has an approved strategic direction that is aligned to the mission, goals, and evolving priorities with specific performance indicators and means to routinely track progress and use progress data to adjust as needed.

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1. Finalize performance measures (KPI) and conduct an alignment review												
2. Conduct design meeting for scorecard , review data collection systems, and identify specifications needed.												

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
3. Adapt or create data collection system to meet MDE specifications												

Objective 5: MDE has created a performance cycle that includes routine progress monitoring, reporting, and using progress data to timely address challenges or performance issues.

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1. Develop a performance cycle (roadmap) with timelines, progress monitoring, reporting expectations and deadlines, and calendar for implementation												
2. Develop training materials to implement the performance cycle (roadmap) and the data collection system												
3. Provide training to staff and teams on data collection system , progress reporting, and using data to identify performance successes and issues (On-site - 3 days)												
4. Monitor implementation of the performance cycle (roadmap) , provide any needed coaching, and make any needed revisions to tools and protocols based on use and feedback (Virtual coaching sessions)												
5. Prepare final project report, gather all documents , and create electronic and written formats of the report and documents												
6. Conduct final project handoff and after action review to identify lessons learned that could be												

Activities	Phase 1 - 2025						Phase 2 – 2025-2026					
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
applied to sustain plan implementation and continuous adjustments as landscape changes												

ADI Team

ADI would bring to bear on this project the following staff and consultants to accomplish the work set out by the RFP: Dr. Allison Layland, Dr. Janice Garland, and Dr. Patti Permenter, as well as our technical staff. The team has extensive experience and expertise at all levels of the educational system and have worked extensively with organization change and leadership, strategic planning, performance management, systems of support, effective systemwide communication, community engagement, organization culture, and continuous improvement, all of which must work in tandem to create a seamless system that promotes and achieves success for all students. A short biography of each is presented below.

Allison Layland, Ph.D., is currently the Chief Education Strategist for the Academic Development Institute (ADI). As a member of the ADI Leadership Team, she manages proposals and projects, monitors budgets, and oversees staff and consultants. Dr. Layland provides technical assistance to states, U.S. territories and Freely Associated States, and districts on strategic planning and performance management, district and school improvement, and implementing the Elementary and Secondary Education Act (reauthorized in 2016 as Every Student Succeeds Act). She was the Assistant Director of a federally funded regional resource center focused on supporting states in implementing the Individuals with Disabilities Act (IDEA). She has trained and coached leadership and staff at federally funded comprehensive centers and has managed projects for six comprehensive centers, including the National Comprehensive Center. She co-designed the Strategic Performance Management process and has facilitated the SPM in more than 15 states, districts, and schools on the continental United States and the U.S. jurisdictions. As a national consultant who has more than 30 years of teaching and leadership experience in general and special education at the school, district, and state levels, she brings research to practice building the capacity of state and local agencies to better service students and their families. She was also an adjunct professor for special education teacher preparation programs at the undergraduate and graduate levels. Allison's specific areas of focus include strategic planning and performance management, continuous district and school improvement, instructional transformation, and rural education. She received a bachelor's degree in elementary and special education from Mount Saint Mary College, a master's degree in special education from James Madison University, and a doctorate in education administration and policy studies from the University of Denver.

Janice Garland, Ed.D. Janice Garland's work as an education specialist for the Academic Development Institute (ADI) and a grant specialist for the Virginia Department of Education's Office of Federal Pandemic Relief Programs support a keen awareness of the current educational landscape, trends, and technological advancements. As an education specialist, she co-develops and delivers training and support for state, district, and school-level comprehensive needs assessment analysis (SWOT), planning, development, implementation, and progress monitoring of strategic and continuous improvement plans. Her holistic view of the systems and processes supporting measured progress and outcomes is evident in her role as a team lead for

national accreditation programs and team member in curriculum audits. As a grant specialist, Janice redesigned the state's federal monitoring tool (protocol), developed guidance on preparing for and participating in monitoring, co-presented the monitoring training, and conducted monitoring. She supports the team by compiling federal reporting data and researching grant impact for the United States Department of Education monitoring. In her previous VDOE role, she served as Lead School Improvement Coordinator in the Office of School Improvement. Janice collaborated across state-level departments to support districts and schools with identified needs, represented the office at national conferences as a presenter and participant, and conducted curriculum audits/reviews to generate essential actions for continuous improvement, including key performance indicators. Her division-level roles have included Executive Director of School Improvement and Innovation, Director of Instruction, Assessment, and Federal Programs. Responsibilities included overseeing PK-12 curriculum, technology, career and technical education, special education, professional development, school improvement, leadership support, and budget development and management. As a practitioner, she relies on systems thinking to ensure structures and processes are in place to implement and measure data-driven plans that improve outcomes.

Patti Permenter, Ed.D

Dr. Patti Permenter has dedicated over thirty years of service to nurturing and building the capacity of learners including pk-12 children, teachers, pre-service teachers, administrators, and stakeholders. Her roots as an educator began while serving in the MS Public Schools as an elementary teacher. During this time, she achieved National Board Certification as an Early Childhood Generalist and was recognized for innovative grants and being a teacher leader. She obtained her Educational Leadership degree and administrative license. Currently, she is an assistant professor for undergraduate and graduate students at William Carey University (WCU) where she teaches Classroom Management and Teaching Reading and Writing through the Content Areas. Dr. Permenter also serves as the associate director for The Program of Research and Evaluation for Public Schools (PREPS) which is housed at WCU. Her myriad of roles for this non-profit organization includes providing networking opportunities and support for the over 100 school districts that belong to the statewide consortium. She helped to develop the PREPS CEO Leadership Academy which has become a premiere training for MS administrators.

Dr. Permenter is also a consultant for Academic Development Institute (ADI) and has worked on projects for various states including Alaska, the Virgin Islands, and agencies such as the Bureau of Indian Education. She was a trainer of coaches and empowerment specialist where she worked on strategic planning for Alaska School Improvement which included partnerships with the Alaska Department of Education, Comprehensive Center Network Region 16, and SEERC, Alaska's Regional Resource Center. Through her work at ADI, she was also co-author of the

Supporting Students in Poverty with High-Impact Strategies toolkit. Because of a passion for early learning, Dr. Permenter has served early childhood organizations including Excel by 5, MS Thrive, United Way, and the Mississippi Early Childhood Association. She is also co-director and founding member of the MS Rural Education Association which celebrates the achievements of MS rural school districts, teachers, and students.

Resumes can be found in Component 2 - Administration.

Component 2- Administration

Resumes for Key Personnel

Allison Layland, Ph.D

QUALIFICATIONS SUMMARY

Allison is the Chief Education Strategist for Academic Development Institute (ADI) where she is a consultant for four Regional Comprehensive Centers. She provides technical assistance to states, U.S. jurisdictions, districts, and schools on strategic performance management, school improvement, instructional transformation, rural education, and implementing the Elementary and Secondary Education Act (ESEA). Previously she was co-director of the Mid-South Regional Resource Center providing support to states on implementing the Individuals with Disabilities Act (IDEA), a Maryland State Department of Education Branch Chief, and program specialist at the Colorado Department of Education. With more than 30 years of education experience at the state, district, and school levels, Allison brings research to practice building the capacity of education organizations to better serve all students and their families.

EDUCATION

Doctor of Philosophy (PhD) Education Leadership and Policy Studies. University of Denver. 2009

Master of Arts (MA) Special Education. James Madison University. 1979

Bachelor of Arts (BA) Social Sciences, Elementary and Special Education. Mt. St. Mary's College. 1977

RELEVANT SKILLS/EXPERTISE

Leading & Leadership Development

- Executive Leader of ADI
- Co-Director of a federally funded technical assistance center
- Providing organization management coaching to the director and staff of a Comprehensive Center

Strategic Planning

Co-creating and implementing the Strategic Performance Management process for state and district education agencies, including training and consultation to clients, assisting with content development, and promoting performance management to other organizations.

School Improvement

- Managing, organizing and implementing complex education programs by using time effectively to design and develop analytical project plans, evaluation data collection, and analyzing project activities, and solving education issues.
- Providing targeted and intensive assistance in designing and implementation of state and district wide school improvement systems that integrate performance management strategies and routines.

Research-Based Instruction & Intervention

- Research, training, and coaching on implementing Response to Intervention, research-based reading and math strategies, personalized learning, integrating technology to enhance instruction, secondary transition services, and family and student engagement.

Conducting Needs Assessments

- Analyzing SPP/APR, NAEP and State performance, monitoring reports, and findings to prepare and coach staff on data discussions with state and district clients.
- Conducting SWOT analyses with states and districts to identify priorities and strategies to address needs.
- Conducting and training technical assistance providers, state and district staff on root cause analysis to identify actionable causes related to low district, school and student performance.

Monitoring & Evaluation

- Conducting regular and ad hoc research and analysis using a variety of methods and provided recommendations and findings based on analysis data and evidence-based practices
- Monitoring states, districts, and schools for compliance with IDEA and ESEA.
- Providing technical assistance to state project and program managers on identifying measures and evaluating program implementation and effectiveness

Rural Populations

- Providing technical assistance, professional learning and coaching in rural districts and schools, including U.S. jurisdictions and the Bureau of Indian Education Tribal schools, in building capacity to assess and address the needs of underserved students and communities, implementing standards aligned, culturally relevant instruction and fostering student self-advocacy skills.
- Designing and implementing tiered instruction and research-based interventions for Tier 1, Tier 2, and Tier 3 in rural and urban schools,

WORK HISTORY

Academic Development Institute (ADI), Chief Education Strategist (2018 – present)

Florida and the Islands Comprehensive Center, Education Specialist (2013 – 2017)

Maryland State Department of Education, Branch Chief (2012 – 2013)

Mid-South Regional Resource Center, Associate Director (2009 – 2012)

National Center on Response to Intervention, Program Associate (2008-2009)

Park Re3 School District, Director of Curriculum and Instruction, (2007– 2008)

Colorado Department of Education, Senior Consultant (2003 – 2007)

AT&T Broadband, Director of Electronic Communication (1999– 2003)

Douglas County Public Schools, Classroom & Computer Resource Teacher (1994 – 1999)

Children's Hospital, Learning Specialist (1992 – 1994)

Fairfax County Public Schools, Due Process Specialist, IEP Specialist, and Special Education Teacher (1979 – 1992)

RELEVANT PROJECT EXPERIENCE

PROJECT MANAGEMENT

Responding to Disruption Project, National Comprehensive Center (2019–2021). Facilitated collaboration of multiple centers and states to identify and create materials to support state and local education agencies in dealing with complex challenges including the impact of the COVID-19 pandemic. Seven toolkits and guides were developed and disseminated over two years.

SISEP and RRCP Implementation Project, (2010-2012). Facilitated collaboration with the State Implementation and Scaling-up of Evidence-Based Practices Center (SISEP) that engaged selected Regional Resource Centers (OSEP funded) and Regional Comprehensive Centers (OESE funded) to learn and apply implementation science. SISEP staff developed and piloted tools with the collaborative team for use in identified projects.

CAPACITY BUILDING

Strategic Performance Management (2015-2024) Facilitation, training and coaching the development of a strategic plan and performance management system to track and report progress and use progress data to adjust resources for effective implementation. Highlights include

- **Bureau of Indian Education, (2015-2019).** Implementation of their plan assisted the Bureau in addressing eight U. S. Government Accountability Office (GAO) findings and increased collaboration across the Bureau, field staff, and schools.
- **Hawai'i State Public Charter School Commission (SPCSC) (2018–2023).**
The SPCSC has the capacity now to use performance data to continuously adjust their plan to meet Hawai'i's charter school statute and provide innovative, high-quality, and diverse learning opportunities to students throughout Hawai'i.
- **Commonwealth of the Northern Mariana Islands Public School System**
Strategic Performance Management resulted in increased collaboration, transition to a district level student information system, online standards based assessments, and a Multi-tiered System of Support with an Early Warning System.
- **Chuuk Department of Education, CHUUK State in the Federated States of Micronesia**
The Chuuk State Public Education System has a defined portrait of a successful graduate and a strategic plan which integrates their culture, language, and traditions into a plan for improved community engagement and increased access to educational opportunities tied to their local needs and priorities.
- **Arkansas Department of Education**
They implemented their first strategic plan which continues today.
- **U.S. Virgin Islands Department of Education**
They continued implementation of their plan through three Commissioner changes and used progress data to adjust goals and work based on the impact of two hurricanes.

COMMUNICATION AND DISSEMINATION

Project Dissemination , Regions 16, 18, and 19 Comprehensive Centers (2001–2003). Created briefs and co-created impact stories to disseminate information on the impact of capacity-

building projects for each center. The communication materials are posted on each center's websites as well as the National Comprehensive Center's website.

Intranet Merger, AT&T Broadband (2001–2003). Directed the project to merge the intranets of two large cable networks into one to increase communication and collaboration between leadership and field officers across states. This included testing multiple network streaming solutions, training staff, and creating a dissemination campaign. The new intranet resulted in better services for users of the AT&T Broadband network.

EVIDENCE USE AND PRACTICE

RMI Educator Effectiveness Project, The Republic of the Marshall Islands Public School System (2019–2023). Directed a project to revise the teacher evaluation process that aligns the RMI PSS Professional Standards, the *Framework for Teaching* by Charlotte Danielson, and the Quality Pedagogy Framework to improve teacher knowledge, skills, and behaviors. A principal evaluation process has also been created to strengthen the instructional leadership skills of principals and head teachers. Principals and teachers report that the system provides opportunities to reflect on and grow their skills to be more effective in meeting student needs.

Palau Instructional Transformation Project, Palau Ministry of Education (2019–2023). Directed building the capacity of the Palau Ministry of Education (PMOE) to use student-centered instructional practices for school improvement. Circles of Success is a comprehensive approach to transformational instruction which includes applying evidence-based practices to enhance classroom instruction. Leadership teams note that teachers are now active and invested in instructional changes because of how they had been included in the Circles of Success and 90-Day Action planning process. Teachers have started tailoring classroom practices to meet individual student needs, making regular data collection a part of their teaching plans, using new technology in their teaching, and creating new rules and expectations for students to follow to improve how their classrooms function.

CONTINUOUS IMPROVEMENT

Rural School Empowerment Project, Alaska Department of Education (2019–2023). Directed the co-development and implementation of a collaborative school improvement process empowering schools and their rural communities to create improvement goals aligned with school and community priorities. The process creates shifts in principals' mindsets and schools' planning processes that bolster continuous improvement in areas such as attendance, literacy, graduation, and entrepreneurship. Positive impacts have been observed including mindset shifts that embrace asset-based approaches and process shifts that strategically address the needs of students in the school community.

PROJECT MANAGEMENT

Grant Management, Regions 18 and 19 Comprehensive Centers (2015–2023). Directed a project to modify and implement a strategic performance management platform so center staff could easily track and report progress on their projects. Progress is reported monthly and quarterly and data from reporting is used to complete required annual performance reporting.

SELECT TECHNICAL ASSISTANCE PUBLICATIONS AND PRESENTATIONS

- Layland, A., Yourupi-Sandy, P., & Villagomez, L. (2023). Strategic planning, performance management, and organizational transformation in the Pacific region.
<https://region18cc.org/blog-updates/strategic-planning-performance-management-and-organizational-transformation-in-the-pacific-region/>
- Layland, A. (2023, April 30). *From cradle to kindergarten: Building pre-reading skills*. The Alaska reading Symposium, Anchorage, Alaska
- Layland, A., Sanchez, E., & Evensen, S. (2022). Building coherence for student success.
<https://region18cc.org/blog-updates/building-coherence-for-student-success/>
- Layland A. & Ensslin, D. (2022, April 29). Why the science of reading? The Alaska reading Symposium, Anchorage, Alaska
- Layland, A. & Permenter, P. (2022, April 29). Starting early: Creating robust language experiences for young children. The Alaska reading Symposium, Anchorage, Alaska
- Layland, A. (2021). Equity in the Every Student Succeeds Act. In Sheley, P. & Redding, S. (Eds.), *Opportunities and Performance: Equity for Children in Poverty*. Information Age Publishing, Inc.
- Layland, A. & Corbett, J. (2021). *Scenario Planning for Learning Recovery*. Rockville, MD: National Comprehensive Center at Westat.
- Layland, A. (2021). *After Action Review Guide for Learning Recovery Planning*. Rockville, MD: National Comprehensive Center at Westat.
- Layland, A. & Corbett, J. (2021). *After Action Reviews for Summer Learning Programs: Identifying Lessons Learned to Accelerate Learning*. Rockville, MD: National Comprehensive Center at Westat.
- Layland, A., Koehler, P., Simpson, J. (2020). *After Action Review Guide*. Rockville, MD: National Comprehensive Center at Westat.
- Layland, A. & Redding, S. (2020). *Managing performance in education agencies*. Information Age Publishing, Inc.
- Corbett, J., Donley, J., Feldman, J., Layland, A., Wilson, M. (2020). *Tools for success in disruption: Immediate recovery and an opportunity to change*. Rockville, MD: National Comprehensive Center at Westat.
- Layland, A., & Redding, S. (2019). *Strategic performance management: A journey in organizational effectiveness*. Rockville, MD: National Comprehensive Center at Westat.
- Layland, A. & Corbett, J. (2017). Utilizing integrated resources to implement the school and district improvement cycle and supports: Guidance for schools, districts and state education agencies.
- Redding, S., & Layland, A. (2017). *Strategic performance for your branch: Organizing people and their work in a LEA or SEA division or strand*. San Antonio, TX: Building State Capacity and Productivity Center.
- Layland, A., & Redding, S. (2017). *Casting a statewide strategic performance net: Interlaced data and responsive supports*. San Antonio, TX: Building State Capacity and Productivity Center.

- Layland, A., & Redding, S. (2016). States chart new directions for education with a little help from their friends. (Solutions No. 8). San Antonio, TX: Building State Capacity and Productivity Center at Edvance Research.
- Redding, S., & Layland, A. (2015). Strategic performance management: Organizing people and their work in the SEA of the future. San Antonio, TX: Building State Capacity and Productivity Center.
- Layland, A. (2014). VI Teacher Professional Growth Plan Guidance and Examples. Tampa, FL: Florida and the Islands Comprehensive Center at ETS.
- Layland, D. (2009) Examination of universal screening in response to intervention at the secondary level. Unpublished doctoral dissertation, Denver, CO: University of Denver.

Janice Garland, Ed.D

QUALIFICATIONS SUMMARY

Janice is an Education Specialist for the Academic Development Institute (ADI). Her role involves providing training and technical assistance support in the continuous improvement cycle, strategic performance management, and equity. She serves Regional Comprehensive Centers 18 and 19, working with state, district, and school levels. As a Grants Specialist for the Virginia Department of Education (VDOE) Federal Pandemic Relief Program, Janice manages up to eight federal and state set-aside grants for 89 districts. She conducts state-level federal monitoring, compiles federal reporting data, and assists in developing and delivering statewide training. With 40 years of educational experience, Janice has worked at the state, regional, district, Tribal, and school levels. She focuses on systems and processes driven by a culture of data-based decision-making to support continuous improvement.

EDUCATION	RELEVANT SKILLS/EXPERTISE
Education Doctorate (EdD) Educational Leadership, Management, and Policy. Seton Hall University. 2018.	Leadership and Organizational Management Research and Policy Analysis Program Evaluation Continuous School Improvement Curriculum Design and Alignment
Master of Arts (MAEd) Art Education. Virginia Commonwealth University. 1988.	Interdisciplinary Standards-Based Instruction Knowledge, Understanding, and Appreciation of Cultures

Art History (BA)

Art Education. University of Richmond. 1981.

WORK HISTORY

Academic Development Institute (ADI), Education Specialist (2022–present)
Virginia Department of Education (VDOE), Grants Specialist (2021–present)
Pamunkey Indian Tribe, Education Director (2020–2021)
Pamunkey Indian Tribe, NOAA Grant Manager (2018–2020)
Garland Educational Consulting, Educational Consultant (2016–2021)
Henrico County Public Schools, Principal Coach (2016–2018)
AdvancED, Lead Evaluator (2016–2017)
Richmond City Public Schools, Executive Director of School Improvement and Innovation (2014–2016)
Virginia Department of Education, Lead School Improvement Coordinator (2011–2014)
Essex County Public Schools, Director of Instruction and Federal Programs (2006–2011)
Essex County Public Schools, General Supervisor (2002–2006)
Virginia Department of Education, Regional Technology Consortium Program Director (2008–2011)
Richmond County Public Schools, Director of Special Programs (1996–2022)
Rappahannock Community College, Adjunct (1997–2000)
Richmond County Public Schools, Teacher (1983–1996)

RELEVANT PROJECT EXPERIENCE

PROJECT MANAGEMENT

Four Rivers Technology in Education Consortium, Rural School Divisions (2008–2011).

Directed a competitive state regional technology grant for 15 divisions/49 rural schools focused on the purposeful integration of technology. Partnered with technology corporations, public broadcasting systems, and universities to produce 13 INTEL Master Teachers who provided INTEL certification training for 95 teachers in schools across the consortium.

National Oceanographic and Atmospheric Administration (NOAA) Species Recovery, Pamunkey Indian Reservation (2018–2020).

Managed the grant implementation, budget, and partnership accountability. Collected data, compiled reports, and submitted required documentation to NOAA. Met bi-weekly with the Director of Finance and Tribal Administrator on expenditures and project status. Supported and monitored the field-based implementation of species recovery work.

CONTINUOUS IMPROVEMENT

Alaska Rural School Empowerment Project, Palau Instructional Transformation Project, Alaska Department of Education, Palau Ministry of Education (2022–present).

Co-developed and delivered training and support for the continuous school improvement process specifically aligned to context and inclusive of culture to state/ministry, districts, and schools. Alaska's work was founded on an asset-minded approach, and Palau's on transformational instruction. Alaska's annual plans evidence asset leveraging to improve inputs, leading to improved outcomes. Palau's 90-day plans include measurable actions focused on enhanced classroom instruction.

Virginia Department of Education (VDOE), State's Identified Priority Schools (29) (2011–2014).

Provided oversight and feedback to districts and school teams in developing, implementing, and monitoring aligned division and school-level improvement plans. Managed VDOE contractor support and monitored lead turnaround partners. Seventy-six percent of Cohort I schools exited sanctions.

CAPACITY BUILDING

Henrico County Public Schools, Comprehensive School Improvement (CSI) School Principals and Administrators (2016–2018).

Developed systems and processes for school-level implementation of district non-negotiables to improve academic outcomes (instructional leadership, interrater reliability, strategic planning). Coached school administration on providing evidence-based feedback to support aligning the written, taught, and assessed curriculum. Instruction and assessments aligned better with standards, and administrative feedback was more evidence-based.

Richmond City Public Schools, Department Members Supporting Schools Facing Federal and State Sanctions (2014–2016).

Trained team members in supporting federally and state-sanctioned schools (20+). Empowered members to design monitoring tools and processes. The school-requested support and deliverables online tracking system and the standalone summer school program for low-performing schools with job-embedded professional development and instructional coaching continue.

COMMUNICATION AND DISSEMINATION

NOAA Species Recovery Grant, Pamunkey Indian Tribe (2018–2020).

Conducted research on the endangered sturgeon species and their role in Tribal culture. Photographed the process and designed a web page to communicate research on the species, grant background, and bi-monthly project updates. Initiated and led procurement for a video production featuring the grant project. <https://pamunkey.org/sturgeon-recovery-grant>

Virginia Department of Education, Office of Federal Pandemic Relief Programs, Federal Program Coordinators (2022–present).

Developed the Office of Federal Pandemic Relief Programs Newsletter for dissemination to district-level federal program coordinators and grant managers. Updates to federal guidance, resources to address unfinished learning, and a safe return to in-person learning were featured articles.

EVIDENCE USE AND PRACTICE

Essex County Public Schools, Division Instruction Team (2006–2011).

Restructured school schedules to support a Title I schoolwide program to support a literacy and mathematics coaching model. Supported the implementation of Instructional Consultation Teams (ICT) to introduce new strategies for challenging students to address disproportionality in special education-identified subgroups. State assessments in reading and mathematics increased, and disproportionality decreased.

Virginia Department of Education (VDOE), Schools Requiring Accreditation Review (2011–2014).

Delivered statewide division and school training for the VDOE Academic Review Process and Aligning Academic Review with Performance Evaluation (AARPE) to improve classroom instruction, observations, and feedback. Led district and school administrative teams and VDOE contractors in reviewing and providing feedback on the written, taught, and tested curriculum, focusing on interrater reliability.

OTHER

Review of District Submitted Every Student Succeeds Act (ESSA) Grant Applications, Louisiana Department of Education (2017-2018).

Reviewed and analyzed Local Education Agency (LEA) submitted ESSA applications, scored against a rubric, debriefed with a partner, and provided feedback to the State Education Agency under a contract with WestED.

Review of District Submitted School Improvement Plans, Illinois Department of Education (2016-2018).

Led peer review teams in analyzing Local Education Agency (LEA) school improvement plans and compiled comprehensive feedback reports for the State Education Agency (SEA) under subcontract with Corbett Education, LLC.

Curriculum Audit, Mansfield Texas Independent School District (2023-2024).

Collected data, conducted observations, and drafted evaluative curriculum and delivery findings as a CSMi district curriculum audit team member. Collaborated with the audit team on prioritizing findings and identifying relevant connections across evaluation components.

Pamunkey Indian Tribe Education Program, Pamunkey Indian Tribe (2023-2024).

Developed, administered, and supervised a PK-8 face-to-face educational program for PK-8 grade Tribal students during the pandemic. Supervised and supported the delivery of a curriculum aligned with state standards using materials that embedded America's Tribal culture and engaged Tribal members.

AdvancED Lead Evaluator, Multiple Schools and Centers (2016-2017)

Trained and led external teams for AdvancEd; Compiled comprehensive reports from data and findings (purpose and direction, governance and leadership, teaching and learning, resources and support systems, physical learning environment) for onsite accreditation reviews of K-12 public and private schools and early learning centers.

SELECT PUBLICATIONS AND PRESENTATIONS

Bailey, B., Roe, C., Meir, A., and Garland, J. (2024, March). "Alaska: Empowering the Arctic Lessons Learned in the School Improvement Journey." Meeting the Moment, National Comprehensive Center Conference. March 4-6, 2024, Washington, D.C.

Wilson, M. and Garland, J. (2023, September). "Equity Training Series." (Western Educational Equity Assistance Center). American Samoa Department of Education leadership, Equity & Compliance Office, and school leadership. September 11-14, 2023, Pago, Pago, American Samoa.

Corbett, J., Howard, H., Chang, E., & Garland, J. (2022). Outcomes Based Contracting (OBC) in K-12: A Playbook. Atlanta, GA: Southern Education Foundation, Inc.

<https://drive.google.com/file/d/1iWutDOSu5mjzhNxjeqVcIF2knPAUsL0E/view>

Garland, J. & Corbett, J. (2021). Sample RFP: Procuring Vendors for Learning Recovery & Acceleration Efforts. Rockville, MD: National Comprehensive Center at Westat.

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- Garland, J. E. and Corbett, J. (2019, May). “Developing More Rigorous Options to Transform Outcomes for Kids: A Primer for State Education Agency Staff and Thought Partners.” Council of Chief State School Officials (CCSSO) Conference. May 9-10, 2019, Salt Lake City, UT.
- Garland, J. E. (2016, July). “Championing Excellence in the Classroom.” 2016 International Research Conference: Leadership and Innovation in Education, Calgary, Alberta, Canada.

Patti Permenter, Ed.D

QUALIFICATIONS SUMMARY

Dr. Patti Permenter is an accomplished educator and administrator with over 35 years of experience in public and higher education settings. She specializes in educational leadership, classroom management, and the development of reading and writing skills across content areas. Dr. Permenter has led numerous programs and initiatives that have directly impacted educational policy and practice, particularly in rural and remote educational settings.

EDUCATION	RELEVANT SKILLS/EXPERTISE
Ed.D., Educational Leadership, William Carey University	Early education program evaluation Classroom and behavior management
Ed.S., Instructional Leadership, William Carey University	Curriculum integration and development Professional development and educator training
M.Ed., Educational Leadership, Mississippi State University	Leadership in educational settings Advocacy for rural and remote education
B.S., Elementary Education, Mississippi State University	Team building and strategic planning

WORK HISTORY

William Carey University, Associate Professor, Assistant Professor, School of Education (2016–Present)
Program of Research and Evaluation for Public Schools, Associate Director (2016–Present)
Academic Development Institute, Education Specialist (2019–2023)
Mississippi Public Schools (Teacher) and Parochial School (Admin/Teacher) (1988–2016)

RELEVANT PROJECT EXPERIENCE

PROJECT MANAGEMENT

- Professional Development Programs Coordinator for WCU Continuing Education and the Program of Research and Evaluation for Public Schools. -Certification Manager for Excel by 5 – Early Learning Program
- Designed and executed professional development sessions for educators across Mississippi, focusing on innovative teaching strategies and classroom management.

CAPACITY BUILDING

- Empowerment Specialist and Coach of Coaches - Led the implementation of a gradual release model to develop and sustain Successful School Improvement Plans across multiple districts and schools. Successfully facilitated a three-year improvement cycle, enhancing relationships through strategic site visits and robust online support. Directed the establishment of measurable goals that significantly boosted academic achievements in line with the Empowerment for Successful School Improvement process. Empowered teams and educated teams on how to implement evidence-based reading programs, aiming to improve grade-level reading proficiency by the end of grade 3. Additionally,

supported leadership teams in formulating standard operating procedures for rigorous, high-quality instruction. Routinely documented and reported progress to key stakeholders and legislative bodies, ensuring transparency and accountability in school improvement efforts.

- Mississippi Rural Education Association, Co-Chair and Founder - Advocated for and promoted excellence in rural schools across Mississippi and the United States.

- Educational Leadership Academy, Facilitator - Developed and facilitated leadership training for administrators focusing on leadership acumen, soft skills, empowerment, and strategic planning.

COMMUNICATION AND DISSEMINATION

- Teaching to the Edges Presentation – Co-Presenter – Mississippi Association of School Superintendents, 2024

- Why Rural Matters in Mississippi – Co-Presenter – Program of Research and Evaluation for Public Schools Conference, 2024

- **Empowering Teachers, Students, and Parents**– Alabama Department of Education MEGA Conference, 2023

- Science of Reading Conference- From Cradle to Kindergarten – Mississippi Early Childhood Association, 2023

- Science of Reading Conference- Alaska Department of Education, 2023, 2022

- Supporting Students in Poverty with High Impact Instructional Strategies, Co-authored a comprehensive guide on effective instructional strategies for students in poverty, published by the National Comprehensive Center at Westat, 2023.

EVIDENCE USE AND PRACTICE

- William Carey University, Course Instructor

- Developed and taught courses that integrated the latest evidence-based strategies for teaching reading and writing across various content areas.

- Served on many local and state boards focused on early education and intervention.

CONTINUOUS IMPROVEMENT

- School Improvement Consultant, Academic Development Institute

- Provided consultancy to the Alaska Department of Education and Region 16 - Empowerment Specialist and Coach focusing on strategic planning, team building, root cause analysis, early literacy, and the science of reading.

- Provided consultancy to the Virgin Island Department of Education focusing on paraprofessional training including classroom management, ELA, and Math content.

- Provided consultancy to the Bureau of Indian Education focusing on early learning and literacy.

OTHER

- Lifetime Educator/Administrator License, Mississippi Association of Independent Schools
- Mississippi Educator License – Administrator – Elementary Education K-8 – Computer Applications – Current
- National Board Certification, Generalist/Early Childhood - 2005-2015

References

Dr. Melly Wilson

Director of Region 18 and 19 Comprehensive Centers

Pacific Resources for Education and Learning

808-441-1363

wilsonm@PREL.ORG

Project Dates: 2018–2024

Project Description: Provide training, consultation, and technical assistance to Guam, Palau, Micronesia, Chuuk on school turnaround, strategic performance management, compliance on federal project reporting.

PJ Foehr

Deputy Director

Hawai'i State Public Charter School Commission

(808) 221-0789

pj.foehr@spcsc.hawaii.gov

Project Dates: 2018-2024

Project Description: Facilitated strategic planning process with performance measures, training and support on a performance reporting tool and provided ongoing implementation coaching.

Dr. Xiomara Herman

Superintendent, Amherst-Pelham Regional School District

Amherst, MA

Project Dates: 2017-2023; 2025-

Project Description: Strategic Performance Management, Continuous District and School improvement, High School Transformation, Pre-K-8th grade Instructional System Improvements

Component 3 – Price

Price/Budget

Phase 1: First Six Months	Activities	Cost
Objective 1	Project Work Plan Kick Off Meeting (onsite) Project Work Plan Develop Process, Schedule, Roles	26,760
Objective 2	Focus Group Meetings and Interviews (onsite) Develop and Administer Survey Analyze Input	49,794
Objective 3	SWOT Analysis (onsite) Review Existing Documents Environmental Scan Conduct SWOT Summarize Findings Create Strategic Direction (onsite) Strategies/Performance Measures (onsite) Structural and Functional Analysis (onsite) Actions/Timelines (onsite) Draft Strategic Plan Stakeholder Workshops (onsite) Finalize Plan Assist in Presentation	135,587
Objective 4	Finalize Performance Measures Design meetings for Scorecard (onsite) Data collection system	94,380
Total Phase 1		306,521
Phase 2: Second Six Months		
Objective 5	Performance Cycle Training (onsite) Monitor Implementation Final project report Final project handoff	51,819
Total Phase 2		51,819
Total Project		358,343

Costs are inclusive of all personnel, materials, and travel expenses.

A detailed breakdown of these costs follows.

Item	Phase 1	Phase 2
Personnel/Consultants	161,150	40,400
Travel	39,390	3,660
Materials	6,000	1,000
System development	60,000	
Total Direct	266,540	45,060
Indirect (15%)	39,981	6,759
Total Cost	306,521	51,819

Component 4 - Other

ADI History and Background

Academic Development Institute was established in 1984. In the 1980s and '90s, with support from the MacArthur Foundation and 29 other foundations and corporations, ADI's Alliance for Achievement (AfA) network of schools implemented a site-based model focusing on ways the school and home build students' studying and reading habits and skills. In 1998, AfA was adopted by the Laboratory for Student Success at Temple University for its comprehensive school reform model, one of only 11 initially validated by the U.S. Department of Education as evidence based. ADI later implemented comprehensive school reform in 123 schools in 13 states and AfA became the comprehensive school reform model. From 1997 to 2006, ADI served as the Parent Information and Resource Center for the state of Illinois. ADI has published the *School Community Journal*, an international, peer-reviewed journal of research and practice, since 1991. ADI's family engagement model, Solid Foundation, has been implemented in more than 300 schools.

In 2005, ADI won the competition from the U.S. Department of Education to launch a national Center on Innovation & Improvement (CII). CII assisted 30 states with systems of support, administered the Academy of Pacesetter States (a network of SEAs with vanguard support systems for school improvement), developed Indistar (a web-based platform that guides district and school improvement processes), and was a leader in national turnaround efforts. Three of ADI's seminal publications on school improvement were awarded Research Publication of the Year awards from the American Educational Research Association.

From 2012 through 2019, ADI was a partner in the Center on Innovations in Learning at Temple University, Building State Capacity and Productivity Center at Westat, and Center on School Turnaround at WestEd. From 2019 through 2024, ADI was a partner in the federally funded National Comprehensive Center and five Regional Comprehensive Centers.

ADI has publications on the following topics: [*Cultivating Rural Education: A People-Focused Approach for States*](#), [*Opportunity and Performance: Equity for Children from Poverty*](#), and [*Managing Performance Strategically in Education Agencies*](#). ADI was also the lead author on the National Center's Supporting Students in Poverty with High-Impact Instructional Strategies Toolkit: [Supporting Students in Poverty with High-Impact Instructional Strategies Toolkit | Comprehensive Center Network \(compcenternetwork.org\)](#) and the Returning to School Toolkit for [Returning to School: A Toolkit for Principals](#). ADI, in partnership with WestEd in the Turnaround Center, produced seminal documents on the [Four Domains for School Turnaround](#) and developed training and technical assistance on using the Four Domains to improve instruction.

ADI's technology department has created tools to meet the needs of educators, including Indistar – a school improvement web-based platform, Strategic Performance Management – a

web-based tool for tracking and reporting progress on strategic plans and performance, Lesson Design Studio – a lesson planning tool and repository, and Solid Foundation – a family engagement tool. ADI also developed three survey instruments, Teacher Satisfaction and Working Conditions Survey, Culture Shift Survey, School Community Index survey, for use by states, districts, and school.

ADI administers programs and projects including family engagement, after-school programs, State and Tribal Education Partnerships, Native Youth Community Project, and a home visiting program. ADI's Liftoff program mentors young people from seventh grade through college to overcome significant life barriers to learning and postsecondary education opportunities. ADI provides technical assistance and training on state and district systems of support, strategic performance management for organization effectiveness, principal leadership, culture shift, improving instructional systems, and building personal competencies in students.

ADI operates with a staff of approximately 20 employees and ten to fifteen consultants. ADI is a 501 3 c corporation, and as such does not have owners but operates with a board of directors, an executive director, and two Chiefs. The company is not debarred from receiving federal funds.

Our Work

ADI's work has evolved over the decades from school reform in Chicago to comprehensive school reform with the Laboratory for Student Success at Temple University, eleven years as the Parent Information & Resource Center (PIRC) for Illinois, seven years administering the U.S. Department of Education funded National Center on Innovation & Improvement, and seven years as a partner in three national content centers—Center on School Turnaround, Center on Innovations in Learning, and Building State Capacity & Productivity Center. ADI was a partner in the National Comprehensive Center and six regional comprehensive centers. ADI works in the continental United States (Alabama, Arkansas, Kansas, Mississippi, Missouri, South Dakota, Illinois, Massachusetts), the U.S. territories (American Samoa, Guam, the Commonwealth of the Northern Mariana Islands, and the U.S. Virgin Islands), and freely associates states (Federated States of Micronesia, the Republic of the Marshall Islands, and the Republic of Palau). In addition, ADI administers youth development and early childhood programs in Illinois and is part of programs for Native American communities, tribes, and schools in Oklahoma, Montana, Idaho, and Virginia.

ADI develops and provides transformational services to improve individual and organizational performance, always aimed at enhancing children's academic and personal development, and an organization's performance. ADI's relationship with a client begins with a conversation to identify the problem, state the goal, and outline a plan of action. Then ADI synthesizes the relevant research and generates ideas to overcome the challenges, solve problems, and achieve results.

ADI's staff, with years of experience in schools, districts, and state and federal education departments, pass the good ideas through the sieve of common sense, converting them into practical applications to place in the hands of the clients. ADI's services are delivered through a range of modes and may also include the creation of foundational documents and tools, including online systems.

ADI's services vary in intensity and duration, from building awareness and understanding of people to transforming organizations. ADI provides and maintains strong consulting, coaching, and problem-solving supports until the client crosses the finish line. ADI's maintenance services (e.g., virtual or onsite coaching, check-ins, boosters) are provided to habituate learning and sustain implementation of effective performance practices.

Recent Projects

Strategic Performance Management

Clients: Arkansas Department of Education, the Bureau of Indian Education, Chuuk State Department of Education, Commonwealth of the Northern Mariana Islands Department of Education, Guam Department of Education, Hawaii Charter School Commission, Kansas Department of Education, Missouri Department of Elementary and Secondary Education, Regions 18 and 19 Comprehensive Centers, U.S. Virgin Islands Department of Education

Key ADI Documents and Tools: *Strategic Performance Management: Organizing People and Their Work*, Strategic Performance management web-based platform

ADI's Strategic Performance Management (SPM) is based on a series of manuals and briefs produced by ADI through USED-funded technical assistance centers and commercial publishers. SPM has been adopted by a variety of organizations, from state education agencies (SEAs) to charter school associations to local education agencies (LEAs), Tribal entities, and schools, where ADI served as the technical assistance provider for implementation. SPM integrates strategic planning and performance management into one seamless process that engages people at multiple levels of an organization or across organizations to: (1) articulate a shared direction in the organization's role in student learning, (2) design actionable work aligned to strategies, and (3) manage implementation through data feedback cycles. Within the framework of the strategic plan, SPM builds practice-focused collaboration through which leaders and faculty/staff closely examine how particular, research-based professional practice is currently being enacted across the organization, consider how to improve it, and work together to reach a higher level of routine implementation. The project will engage a state department, district, or school in the SPM journey over multiple years to build capacity of the organizations to sustain high performance and achieve higher results.

Since 2015, SPM has been adopted by State Departments of Education, Education Departments in U.S. Jurisdictions, districts, and most recently schools to set a strong direction based on

organizational priorities and student data, apply evidence-based practices to bring action to plans, monitor their work, and adjust as needed to sustain efforts to improve student learning.

At the end of Year 1 of the Strategic Performance Management Projects, 100% of respondents indicated they gained knowledge and understanding on how to align local, state, and federal policies.

At the end of Year 3, 100% of respondents indicated they gained new knowledge and skills to carry out their work; a clear understanding of organizational structure and functions, and the structures had improved; and understanding of how to secure, align, or use resources and were able to better secure and use resources aligned to their plan and work.

At the end of Year 4, at least 86% of respondents reported continued implementation and use of knowledge and skills to effectively implement strategies and achieve results.

Progress and completion of milestones also demonstrated positive impact through the Strategic Performance Management project. For example, one client's data indicated monthly reporting on strategic actions completion rates were Year 1: 60%, Year 2: 90%, Year 3: 99%, and Year 4: 100%. Completion of strategic action planning for subsequent or future years was sustained at 100%.

Impact of Strategic Performance Management on organizational changes and improvements included the development of logic models and after-action reports, needs-based adjustments to the strategic plan and reporting guidelines, development and implementation of new programs (e.g., Early Warning System), and scaling-up of a communication plan to reach diverse stakeholder groups.

Pre- and post- self-assessments indicate at least 80% improvement on effective strategic planning and performance management indicators by the U.S. Virgin Islands, the Bureau of Indian Education, and the Departments of Education in Arkansas, Kansas, and Missouri.

At the end of each year of the project 89% of respondents indicated technical assistance services were provided based on their high priority needs and were evidence-based and aligned to their state strategic plan or ESSA goals. In addition, 100% of respondents reported technical assistance staff provided services in a collaborative, timely manner, and they worked in a manner that fostered a trusting relationship. The staff who delivered services have necessary knowledge and skills and services were delivered as agreed upon.

Transformation Academy

Clients: Alabama Department of Education and its schools identified for Comprehensive Support and Improvement, Mississippi Department of Education and its schools identified for Comprehensive Support and Improvement, Illinois Region 30 and its schools, and the Palau Ministry of Education and its schools

Key ADI Documents and Tools: Jump-Starting Instructional Transformation for Rapid School Improvement

System of Support for School Improvement

Clients: Alaska Department of Education and Early Development, Thirteen State Departments of Education, Hawaii Charter School Commission, U.S. Virgin Islands Department of Education,
Key ADI Documents and Tools: Collaborative Success Manual, *Handbook on System of Support*, System of Support Guide, Indistar web-based platform

Native American Education

Clients: Bureau of Indian Education (Principal Leadership Academy); Cheyenne and Arapaho Tribes, Consortium of the Chickahominy Indian Tribe, Chickahominy Indian Tribe - Eastern Division, Monacan Indian Nation, Pamunkey Indian Tribe, and the Upper Mattaponi Indian Tribes, Muscogee (Creek) Nation and Oklahoma State Department of Education, National Comprehensive Center; Nez Perce Tribe and the Idaho State Department of Education, Tribal Education Departments National Assembly, Northern Cheyenne Tribe

Key ADI Documents and Tools: Solid Foundation Planning web-based platform *Handbook on Family & Community Engagement*, Circles of Reflection: A Toolkit for State Departments of Education, Sovereignty Performance Management Guidebook and Sovereignty Performance Management web-based platform

Culture Shift Institute

Client: Alabama State Department of Education

Key ADI Documents and Tools: **Culture Shift survey**, Shifting School Culture to Spark Rapid Improvement; Quick Start Planning web-based platform

Teacher Working Conditions

Client: North Carolina Department of Education

Key ADI Documents and Tools: North Carolina Teacher Working Conditions Survey

Appendix C - References

Client Name	Pacific Resources for Education and Learning
Contact Name and Title	Dr. Melly Wilson
Contact Address	
Contact Telephone Number	808-441-1363
Email Address	wilsonm@PREL.ORG
Type of work provided to the client	Training, consultation, strategic performance management
Effective contract dates for the time frame services were/are being provided to client	2019-2024

Client Name	State Public Charter School Commission
Contact Name and Title	P.J. Foehr, Deputy Director
Contact Address	
Contact Telephone Number	808-221-0789
Email Address	pj.foehr@spcsc.hawaii.gov
Type of work provided to the client	Strategic planning
Effective contract dates for the time frame services were/are being provided to client	2019-2024

Client Name	Amherst-Pelham Regional Schools
Contact Name and Title	Dr. Xiomara Herman, Superintendent
Contact Address	170 Chestnut St., Amherst, MA 01002
Contact Telephone Number	413-362-1807
Email Address	hermanx@arps.org
Type of work provided to the client	Strategic planning
Effective contract dates for the time frame services were/are being provided to client	01/25-current

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](#) under “Public Notice” Request for Applications, Qualifications, and Proposals section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: *If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.*

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor’s bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The Offeror represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s bid or proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

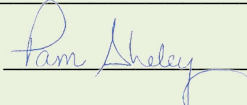
COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Pam Sheley

Title: Executive Director

Signature:  Date: 02/04/25

Modifications or additions to any portion of this document may cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

____ Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

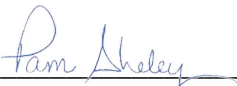
Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

02/04/25

Date

Pam Sheley

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

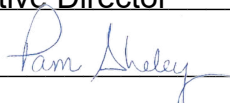
NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Pam Sheley

Title: Executive Director

Signature:  Date: 02/04/25



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

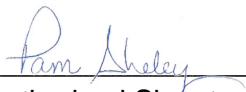
Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

02/04/25

Date

Pam Sheley
Printed Name

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (x)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Appendix I – COST DATA/BUDGET

The vendor should refer to [Section 2.3 Deliverables](#) and provide line-item cost detail for all deliverables identified.

Attach Excel spreadsheet if necessary.

Please refer to pages 33-34 in the proposal for complete budget for this project.

Appendix A – Proposal Cover Sheet

Company/Name: Advanced Learning Partnerships, Inc.

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Amos Fodchuk, President
Mailing Address	PO Box 17254
City, State, Zip	Chapel Hill, NC 27516
Telephone:	919-308-2636
E-Mail Address:	amos@alplearn.com

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	Katy Fodchuk, Executive Director of Organizational Development
Telephone Number	919-428-5636
Email Address	katy@alplearn.com
Physical Address	Same
City, State, Zip	Same
Mailing Address	Same
City, State, Zip	Same

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? VND213474101
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: February 4, 2025

Mississippi Department of Education Strategic Planning and Performance Scorecard Project

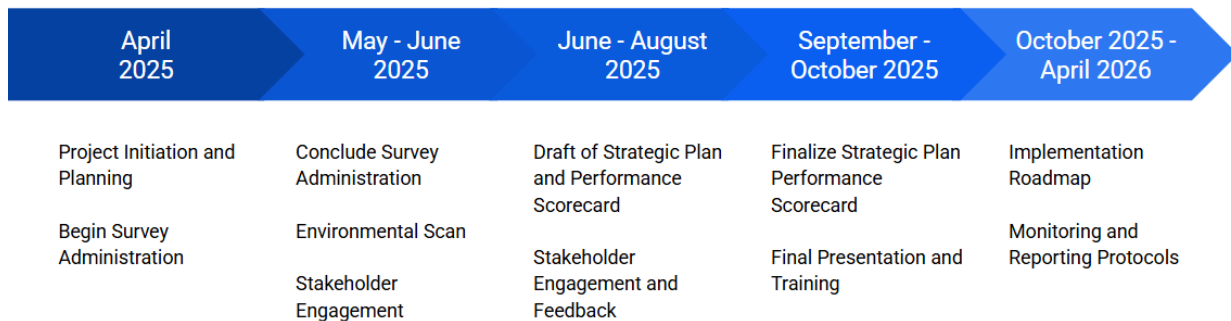
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
January 10, 2025 Issue Date

Advanced Learning Partnerships (ALP) and Panorama Education, in response to the Mississippi Department of Education’s expressed need and goal of developing a comprehensive strategic plan and performance scorecard for the MS State Board of Education, share their combined expertise, experience, resources, and technology applications to achieve this goal.

COMPONENT 1: PLAN OF ACTION

Overview of Project

ALP and Panorama propose a two-phase approach, resulting in a one-year engagement to accomplish the goal of developing a comprehensive strategic plan and performance scorecard for the MS State Board of Education with a clear roadmap that aligns with its mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability. The timeline for the project is illustrated below:



Timeline	Action Step and Deliverables
<p>Phase 1: 6 Months (April 1, 2025 - October 1, 2025)</p>	<ul style="list-style-type: none"> A. Project Initiation and Planning <ul style="list-style-type: none"> a. Kick-off Meeting b. Project Work Plan c. Stakeholder Identification B. Environmental Scan and Data Collection <ul style="list-style-type: none"> a. Review of Existing Documentation b. SWOT Analysis c. Stakeholder Surveys and Focus Groups d. Environmental Scan Report e. Stakeholder Engagement Plan C. Strategy Development <ul style="list-style-type: none"> a. Mission and Vision Review b. Goal Setting c. Strategy Formulation D. Performance Scorecard Development <ul style="list-style-type: none"> a. KPI Identification b. Scorecard Design c. Data Collection Mechanisms E. Stakeholder Engagement and Workshops <ul style="list-style-type: none"> a. Stakeholder workshops b. Engagement Plan c. Feedback Incorporation F. Drafting and Finalizing the Strategic Plan <ul style="list-style-type: none"> a. Draft Strategic Plan b. Review and Revision c. Final Strategic Plan G. Final Presentation and Handover <ul style="list-style-type: none"> a. Presentation to the Board b. Documentation Handover c. Training Session
<p>Phase 2: Six Months (October 1, 2025 - April 2026)</p>	<ul style="list-style-type: none"> ● Implementation and Monitoring Plan <ul style="list-style-type: none"> ○ Implementation Roadmap ○ Monitoring and Reporting Mechanism ○ Review and Adjustment Protocol

Phase 1.A: Project Initiation & Planning

Kick-Off Meeting

The Mississippi Department of Education (MDE) strategic planning process will commence with a structured **Kick-Off Meeting** designed to align stakeholders, set expectations, and establish project milestones. ALP and Panorama Education will facilitate this session, ensuring all key participants, including key SBE and Board Designees, school district representatives, and community stakeholders, have a shared understanding of the initiative's objectives. MDE, ALP, and Panorama will be referred to as the "partnering organizations" henceforth.

Objectives of the Kick-Off Meeting:

- **Clarify the project scope, objectives, and deliverables** ALP will facilitate discussions to clarify objectives, define project goals, outcomes and deliverables, and success criteria. MDE will provide an overview of their past strategic plan achievements, strategy carry over, regulatory requirements, and emerging new directions for the new plan. Panorama will present the scope of their existing work in Mississippi school districts along with broader cross-district trends and priorities relevant at the state-level.
- **Establish communication protocols and roles** The partnering organizations will define a structured communication framework and reporting cadence. ALP will share resources for their Optimize Meetings Protocol to ensure all synchronous time and communications are efficient, effective, and purposeful.
- **Confirm stakeholder engagement strategies** ALP and Panorama will partner with MDE to identify key internal employee stakeholder groups as well as external groups across Mississippi.
- **Review the proposed project timeline** ALP and Panorama will present a preliminary project timeline including milestone-driven deadlines and progress monitoring and data collection metrics and timelines. The partnering organizations (ALP, Panorama, and MDE) will collaborate to ensure shared approval for project deliverables, program interventions and activities, evaluation, and timeline.
- **Align on data collection and performance metrics** ALP and Panorama will define a preliminary evaluation plan, including, data collection, analysis, and reporting timelines. Panorama will present dashboard examples demonstrating their platform's capacity to track and visualize data effectively. The partnering

organizations will collaborate to review, refine, and integrate MDE system-specific needs and strengths.

This meeting will serve as the foundation for an effective planning process resulting in a clear and outcomes-driven plan with complementary and synchronized workstreams.

Project Work Plan

Following the kick-off meeting, ALP will develop a **detailed Project Work Plan** that outlines key milestones, deliverables, and timelines. This plan will provide a structured roadmap, ensuring the project stays on track and meets MDE's expectations.

Key Components of the Project Work Plan:

- **Detailed Timeline:** Mapping project phases to deadlines
- **Roles & Responsibilities:** Defining ALP, Panorama, and MDE responsibilities
- **Risk Mitigation Strategies:** Identifying potential barriers and solutions
- **Stakeholder Engagement Milestones:** Scheduled interactions for feedback and validation
- **Data Collection Plan:** Outlining surveys, focus groups, and document analysis

This structured work plan will serve as a guiding document throughout the initiative.

Stakeholder Identification

ALP recognizes that the success of Mississippi's strategic planning process depends on meaningful stakeholder participation. Our approach will ensure broad representation from education leaders, teachers, students, families, and community partners.

ALP and Panorama will partner with MDE to identify key internal employee stakeholder groups as well as external groups across Mississippi. ALP will customize a stakeholder engagement framework for strategically integrating key groups in the appropriate implementation phases to maximize and leverage their voices and perspectives via data collection opportunities (surveys, interviews, focus groups, and professional learning).

Proposed Stakeholder Groups:

- **MDE Leadership & Board Members**
- **MDE Employees**
- **Mississippi School & District Administrators**
- **Teachers & Support Staff**
- **Students & Families**
- **Community Organizations, Employers, & Business Leaders**
- **Mississippi Institutions for Higher Education**

In order to leverage existing data to inform our approach, MDE will provide Panorama and ALP with past stakeholder engagement data (surveys response, event attendance, focus group results, etc.). Panorama’s **survey and data visualization tools** will further support stakeholder engagement by capturing insights in real time and making timely adjustments to strategy.

Timeline: ALP 3 Remote Consulting Days

Deliverable: Project Work Plan

Phase 1.B: Environmental Scan & Data Collection

Approach to Understanding the Educational Landscape: Panorama Education Survey Program

In order to build a strategic plan that captures and incorporates the needs of stakeholders from across the state, Panorama Education will conduct surveys of students, educational staff, families, and community members from across the region. The data from these surveys will be leveraged as both a critical data point for strategic plan development, and also available for analysis and evaluation by Staff at the Mississippi Department of Education.

Environmental Scan and Data Collection

Panorama Education & ALP will conduct a rigorous environmental scan and data collection process that leverages a combination of quantitative and qualitative methodologies. Our process ensures a holistic understanding of the current educational landscape while aligning with the state's strategic priorities and future goals.

Through our industry-leading research-based approach, we will analyze existing policy landscapes, student and educator experiences, academic performance data, and stakeholder perspectives to support strategic decision-making. This approach centers around continuous improvement to ensure that all students benefit from an inclusive and supportive learning environment.

The objectives of the Environmental Scan include:

Review Existing MBE/SBE Documentation:

- Analyze performance data and any other data and documentation made readily available relating to past strategy, goals, and outcomes.
- Assess the effectiveness of the previous strategic plan, identifying areas of success and opportunities for improvement.
- Utilize MDE data to identify employees' strengths, professional growth needs, resource allocation, and workforce development opportunities and challenges.

Identify Key Educational Trends:

- Analyze state and national education trends that impact planning, policy, and strategy.

Data Collection Strategy:

Organizations integrate strategic plans to ensure that their internal capacity (e.g., employees/talent and resources) can meet the opportunities and threats of the external market or environment. In order to best understand both internal capacity and external demands, ALP and Panorama will employ a multi-faceted data collection approach, ensuring that community voice is authentically reflected in goal focus and direction of the Strategic Plan.

Document Review and Interviews with Key Stakeholders: ALP will conduct a review of internal performance capacity, organizational structure, and talent assets, existing reports, policies, and strategic plans from MDE and local districts. ALP will also conduct structured interviews with MDE and SBE leadership, policymakers, and district administrators to integrate their subject matter expertise as it relates to internal and external SWOT factors influencing MDE strategy in the coming years. These interviews will include specific questions and discussions surrounding MDE’s current mission and vision statements and past integration and/or misalignments with the strategic plan. Identifying the vision for the new strategic plan will be thoroughly addressed in ALP’s Strategic Planning service’s “Phase 1: Goal Identification.”

To establish a data-driven foundation, Panorama will partner with ALP to conduct a comprehensive review of existing reports, strategic plans, and performance data. This review will help identify alignment opportunities and gaps in the state’s current strategies, but also inform what areas of data collection on which to focus our survey work.

Key areas of focus:

- **Academic Performance Data:** Trends in student achievement, equity gaps, and school performance indicators.
- **Existing Strategic Plans and Initiatives:** Alignment with state and district goals.
- **Policy and Legislative Landscape:** Impact of funding structures and accountability systems.
- **Workforce Readiness:** Alignment of K-12 education with postsecondary and career pathways.

SWOT Analysis

Panorama and ALP will leverage survey results to facilitate a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, synthesizing key findings to provide:

- **Strengths:** Successful programs, leadership capacity, and resource availability.
- **Weaknesses:** Barriers to access, funding constraints, and instructional gaps.
- **Opportunities:** Emerging education policies, technology integration, and funding opportunities.

- **Threats:** Systemic challenges such as educator retention, declining enrollment, and equity disparities.

Our analysis will benchmark state findings against national trends, leveraging insights from our work with state education agencies, including Kentucky, Rhode Island, New Mexico, and Iowa.

Stakeholder Surveys & Focus Groups

Panorama will design and deploy statewide surveys that engage key stakeholder groups identified in the Project Work Plan phase. These surveys will ensure the representation of MDE employees, Mississippi educators, students, families, businesses, and community members, gathering feedback on priorities and concerns. Survey design will include both quantitative and qualitative metrics.

Panorama will administer a series of anonymous stakeholder surveys to capture the perceptions of students, teachers, families, and community members on the state's current education environment and future needs. These surveys will provide data-driven insights on key issues, including:

- **Student experiences:** School climate, engagement, learning conditions,
- **Educator perspectives:** Working conditions, professional development needs, resource allocation, leadership support, and school climate.
- **Family engagement:** Parent and caregiver insights on communication, school involvement, and barriers to participation.
- **Community partnerships:** The role of local organizations, businesses, and postsecondary institutions in student success.

Panorama has a proven track record of administering large-scale survey initiatives, including partnerships with over a dozen state education agencies and dozens of major urban school districts across the country. Our platform supports multilingual survey distribution, ensuring inclusivity and high response rates across diverse communities.

Survey Data Collection and Analysis

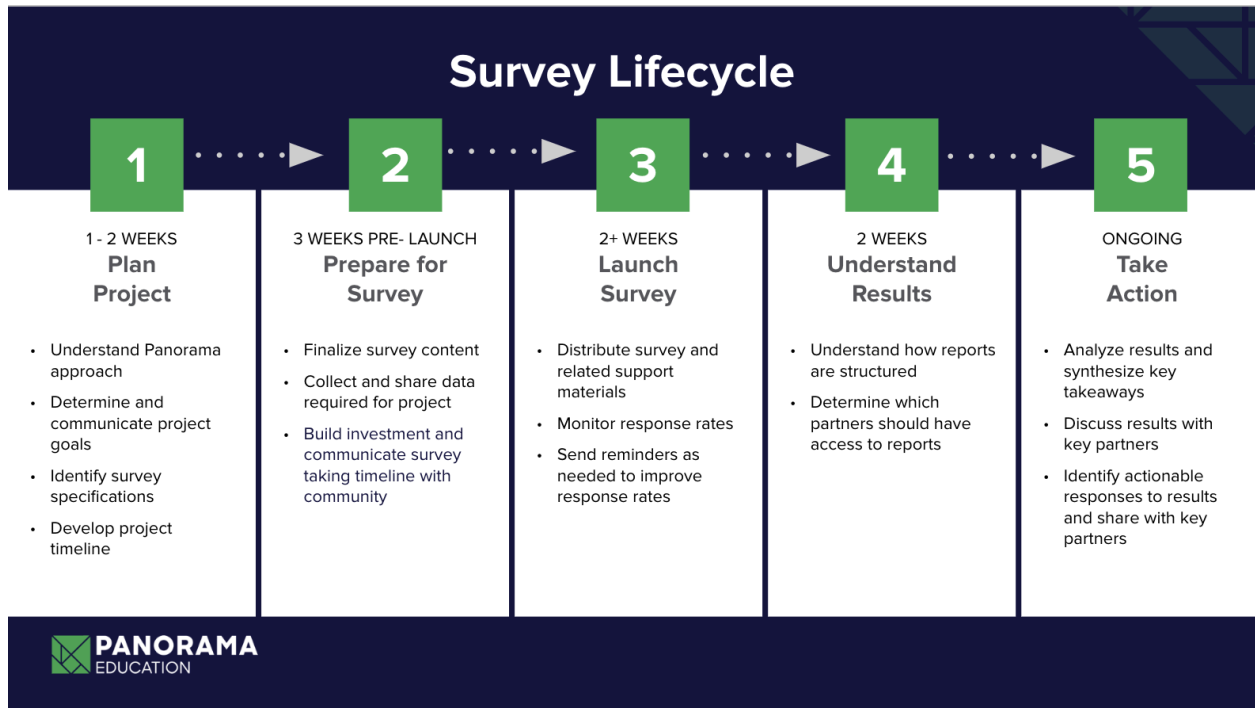
The data collection process will include:

1. **Survey Design and Administration:** Using evidence-based and validated survey instruments tailored to the state's needs.
2. **Response Rate Monitoring:** Utilizing a real-time response dashboard to track participation across stakeholder groups.
3. **Data Disaggregation:** Analyzing results by demographic factors to ensure an equity-focused approach.
4. **Qualitative Insights:** Integrating open-ended responses, interviews, and focus group findings into the analysis.

Panorama Education is committed to providing MSDOE with a cost-effective, scalable survey program and platform that delivers high-quality insights and long-term value. Panorama provides comprehensive support, robust analytics, and a flexible survey platform that can adapt to the state's evolving needs.

ALP and Panorama propose a recurring survey program for all stakeholders across the state similar to implementations in other states, from Iowa to New Mexico to New Hampshire. This program would begin in the first six months of the engagement, with the potential to recur annually in order to most meaningfully collect and measure annually the perception of stakeholders around both the initial strategic direction and, later, the changes in school climate, safety, and educational environment that are built in as KPIs. However, for the purpose of this proposal, ALP and Panorama will provide a smaller version in which a subset of the stakeholder groups are surveyed for key data.

Panorama leverages the following cycle for survey administration. This process can involve longer survey windows, but allows for states to administer surveys and release results on a quick timeline, if desired.



Environmental Scan Report and Stakeholder Engagement Plan

ALP and Panorama will ensure that survey data, focus group discussions, and interview insights are synthesized into actionable themes, aligning with ALP's Strategic Planning Service's [Phase 1: Goal Identification](#) process and deliverables. Findings from this phase will be synthesized into an **Environmental Scan & SWOT Analysis Report**, providing a data-driven foundation and recommendations for goal-level focus areas. MDE will receive a comprehensive stakeholder engagement plan that outlines how key stakeholders will be included and their voices incorporated into the strategic planning process.

Timeline: Panorama | ALP 3 Remote Consulting Days

Deliverables: Environmental Scan, SWOT Analysis Report, Stakeholder Engagement Plan

Phase 1.C-D: Strategy and Performance

Scorecard Development

The Strategy Design phase builds upon insights gathered during the Environmental Scan & Data Collection process to establish a structured, results-driven framework for the Mississippi Department of Education's (MDE) strategic plan. ALP's approach ensures clarity, coherence, and accountability by defining strategic planning concepts in alignment with business and organizational development evidence-based practices.

Approach to Strategy Development

ALP will work collaboratively with MDE leadership, educators, and community stakeholders to refine strategic priorities based on findings from the Environmental Scan. Our approach includes:

1. **Facilitated Onsite Strategic Planning Professional Learning Sessions:** ALP will facilitate collaborative and interactive workshops to collectively define goals, objectives and KPIs, and align Mississippi's education priorities. Participants will build competence and capacity in the design of clear, actionable, and measurable strategies.
2. **Data Integration and Stakeholder Validation:** Using MDE participant subject matter expertise as well as survey feedback, focus group discussions, and leadership interviews, ALP will ensure that strategies reflect the needs and expectations of Mississippi's educational communities.
3. **Iterative Refinement:** ALP will refine strategic plan components in collaboration with MDE through multiple feedback cycles to ensure feasibility, effectiveness, and alignment with available resources.

ALP Strategic Planning Service Implementation Phases

ALP's strategic planning approach follows a structured multi-phase process to ensure alignment with organizational goals, stakeholder input, and measurable outcomes. The phases include:

Phase 1: Discover and Dream – Goal Identification

- Appreciative Inquiry: Discovery and Dream Phases – Integration community survey and data review phase to bring in stakeholder voices and identify MDE needs, strengths, and areas for growth.
 - Review of Data Collection and Environmental Scan Findings and Recommendations
 - Facilitation of the discovery phase of Appreciative Inquiry, where district leaders and educators identify strengths, envision possibilities, and define major strategic goals.

Phase 2: Dream and Design – Objectives and KPIs

- ALP: Appreciative Inquiry Design Phase – Define measurable objectives outcomes required to achieve each major goal, typically 2-4 per goal.
- ALP: Identify unique Key Performance Indicators (KPIs) for each outcome.
- Panorama: KPI Scorecard & Dashboard Design - Collection/integration of state-level data by KPI, KPI scorecard dashboard. Staffing, Pricing needed
- Recommended MDE Participants: MDE Cabinet and Department Head employees; Research, Data, and Accountability Personnel

Phase 3: Strategy Design and Destiny

- AI Deliver Phase – Develop major strategies (“the how”) necessary to achieve objectives.

Phase 4: Destiny – Structures for Strategy Implementation and Project Management

- Design and integration of a shared digital space for strategy and implementation leaders to collaborate, manage timelines, update progress, collect resources and artifacts, and assign projects.
- Build and train staff on a project management platform (e.g., Monday.com, Asana, or platform of MDE choice).

The **Strategy Design** phase builds upon insights gathered during the Environmental Scan & Data Collection process to establish a structured, results-driven framework for the Mississippi Department of Education’s (MDE) strategic plan. ALP’s approach ensures clarity, coherence, and accountability by defining strategic planning concepts in alignment with best practices.

ALP Strategic Planning Service Phases, Concept Definitions, and Examples

Strategic Planning Concept and Definition	Examples
<p>Goal: A broad, aspirational statement that defines the desired long-term impact of the strategic plan. Goals provide overarching direction and serve as guiding statements for MDE’s direction and initiatives.</p>	<p><i>GOAL 1: Students across Mississippi engage in learning experiences that develop their skills, knowledge, and agency to prepare them for future success in one or more of the 4 "E's" (Enrollment, Employment, Entrepreneurship, Enlistment).</i></p>
<p>Objective: Objectives articulate measurable outcomes that must occur prior to achieving the goal. Goals typically contain multiple smaller objectives that are representative of the larger goal statement.</p>	<p><i>Mississippi public school students engage in meaningful learning experiences that are relevant to their individual goals and aspirations. Teachers integrate problem and project based learning to guide and foster agency in students to pursue their personalized learning pathways. Schools partner with local organizations (business, non-profit, government) to increase student’s real-world learning experiences and connection to their local community</i></p>

Strategic Planning Concept and Definition	Examples
<p>Key Performance Indicators (KPIs): Metrics used to assess progress toward objectives.</p>	<p><i>By 2027, increase student reports of engagement and enthusiasm for learning by 10%, as measured by annual student surveys.</i></p> <p><i>Reduce chronic absenteeism rates by 10% over the next five years through targeted interventions.</i></p> <p><i>Increase by 5%/year Career Technical Education partnerships between schools and local organizations.</i></p> <p><i>Increase by 10% of graduating seniors who report that their K-12 learning experiences prepared them for post-graduation career opportunities.</i></p>
<p>Strategy: A high-level approach or method used to accomplish objectives. Strategies provide a framework for implementing systemic improvements. There are typically several strategies aligned to each objective.</p>	<p><i>Expand access to personalized, competency-based learning pathways to ensure students experience learning tailored to their strengths and interests.</i></p>
<p>Tactics: Specific actions, projects, and initiatives that support the implementation of strategies. Tactics define the "how" of execution, detailing implementation steps, responsible parties, and timelines.</p>	<p><i>Research evidence-based professional learning programs that build educator capacity to integrate project based learning and instructional strategies that promote student agency.</i></p>

Deliverables

The **Strategy Design phase** will result in a well-defined roadmap including these deliverables:

- **Strategic Implementation Plan:** ALP and the MDE community collaborate to design higher level and visionary goals; objectives for each goal with aligned key performance indicators, strategy, and its supporting tactics/projects/action items.
- **KPI Scorecard:** Panorama ...complete this part
- **Digital Program Management Platform:** ALP will work closely with MDE leaders and select employees who will lead and implement strategies in the coming four years. They will identify prioritized tactics identified for the current or upcoming year, within the timeframe of the new strategic plan. This work includes the build out of MDE's project management platform and training to leverage it (prioritizing project timelines, responsible parties and roles, updates/communication, status, data analytics).

This structured approach ensures that MDE's strategic plan is actionable, measurable, and responsive to the evolving needs of Mississippi's education system.

Phase 1.E-F: Stakeholder Engagement & Workshops

ALP and Panorama will facilitate highly interactive and collaborative workshops to engage MDE stakeholders in the strategic planning process. These sessions will ensure alignment on goals, objectives, and KPIs while fostering collective ownership of the plan.

Phase 1 Workshops: Goal Identification & Visioning

- **Format:** 2 Onsite Days & 2 Asynchronous Days
- **Facilitators:** ALP Organizational Development Consultant; Panorama
- **Recommended Participants:** MDE Cabinet and Department Head employees
- **Objectives:**
 - Present findings from the Environmental Scan and community survey
 - Facilitate discussions using Appreciative Inquiry to define organization strengths, envision the future, and establish major strategic goals

- Synthesize themes and finalize goal statements

During the goal identification and visioning workshops, findings from the Environmental scan and community survey will be utilized, in conjunction with and alignment to the review of the mission and vision statements of MDE. ALP and Panorama will facilitate discussions among key stakeholders using the Appreciate Inquiry cycle to identify and define organization strengths, paint a compelling vision of the future and establish major strategic goals. The outcomes of this visioning work will support the affirming and/or refining of MDE's mission, vision and core values. This process will culminate in a synthesis of themes and a finalization of goal statements to inform the strategic plan.

ALP will leverage its strong understanding and demonstrated experience in organizational change leadership and strategic plan design and implementation processes, as well as its proven experience in facilitation of thought leadership and collaboration among education leaders.

Phase 2 Workshops: Objectives & KPIs Development

- **Format:** 3 Onsite Days - Workshops, 5 Remote Days
- **Facilitators:** ALP Organizational Development Consultant; Panorama
- **Recommended Participants:** MDE Cabinet, Department Heads, Research & Accountability Personnel
- **Objectives:**
 - Define measurable objectives aligned to each goal (2-4 per goal)
 - Develop corresponding Key Performance Indicators (KPIs)
 - Work collaboratively to draft an initial KPI Scorecard design

During the objectives and KPIs workshops, ALP will lead and facilitate the identification of measurable outcomes needed to achieve each of the major goals and develop the key performance indicators (KPIs) for each outcome. Moving from goals to objectives requires identifying aligned measurable outcomes and writing objectives as though they have already been realized.

Facilitation of this phase will include collaborative work in a larger planning committee group, small goal groups, asynchronous iterative collaboration, and asynchronous design work to develop and refine these key performance metrics. ALP's design team will leverage generative AI to support the synthesis of data and collective input, as well as to

enhance the drafting of the plan verbiage. During these workshops, participants develop increased capacity to identify vision and outcomes of strategy and measure ongoing progress toward realization, leveraging their Increased participant voice, clarity, and commitment toward organizational vision for change.

In close partnership with teams charged with leading and implementing strategic change, ALP facilitates the design of a plan that is clear, measurable, and realizable.

Phase 3 Workshops: Strategy Development

- **Format:** 2 Onsite Days, 1 Offsite Day
- **Facilitators:** ALP Strategy Experts
- **Recommended Participants:** MDE personnel responsible for strategy implementation
- **Objectives:**
 - Develop strategies to achieve each objective
 - Assign responsible teams for implementation
 - Establish early action steps and milestones

During the strategy development phase, ALP will facilitate the design of the high-level strategy to achieve the objectives and goals identified in the Phase 1 and Phase 2 workshops. The MDE team with ALP will develop strategies to achieve each objective, assign responsible teams for implementation of each strategy, and establish early action steps and milestones to support implementation, accountability, and progress tracking.

Stakeholder Engagement

ALP will create a brief survey to solicit targeted feedback from the broader stakeholder community. ALP will design a survey tool that will facilitate these stakeholders' review and feedback of the strategic plan draft, which will be distributed by the MDE. This feedback will be aggregated and presented to MDE leadership who will determine what revisions should be made to the strategic plan draft. Additionally, ALP will provide high-level recommendations for further tactics and action planning, implementation, and tracking of the strategic plan based on stakeholder feedback.

ALP's collaborative planning processes integrate stakeholder voices in discovering their strengths and needs and envisioning possibilities based on that capacity.

Phase 4 Workshops: Implementation Structures & Project Management

- **Format:** 4 Days for Digital Space Design, 3 Days for Training
- **Facilitators:** ALP Implementation Specialists
- **Recommended Participants:** MDE Strategy & Implementation Leaders
- **Objectives:**
 - Design and integrate a project management platform
 - Train MDE staff on collaborative tools for tracking progress
 - Establish monitoring and reporting structures

During the implementation structures and project management phase, ALP Implementation Specialists will design a project management platform and integrate the strategic plan into the platform to ensure visibility, tracking, and monitoring of the strategic plan. ALP will train MDE staff on how to use collaborative tools for tracking progress towards goals and objectives. Additionally, monitoring and reporting structures will be established to ensure long term commitment to the strategic plan and tracking of outcomes.

This structured engagement process ensures all key stakeholders have a voice in shaping the strategic direction while providing clear accountability structures for implementation.

ALP and Panorama will facilitate highly interactive and collaborative workshops to engage MDE stakeholders in the strategic planning process. These sessions will ensure alignment on goals, objectives, and KPIs while fostering collective ownership of the plan.

Timeline: ALP 20 Onsite/Remote Consulting Days

Deliverables: Draft of Strategic Plan and Performance Scorecard; Final Strategic Plan and Performance Scorecard

Phase 1.G: Final Presentation and Handover

Presentation to the Board

ALP and Panorama will design a final presentation of the process and final product of the strategic plan initiative. This presentation will include key processes such as identification of key stakeholders, the results of the environmental scan and data collection, and the process for developing the strategy plan and performance scorecard. The goals of this presentation is to be transparent about the process for developing the strategic plan and performance scorecard, increase participant capacity for engaging in strategic planning work in the future, and to secure approval for the implementation of the strategic plan.

This presentation will be conducted synchronously to field questions and comments that may be presented by Board members. Additionally, the presentation document and resources will be made available to all for reference and to guide the facilitation of future presentations to the larger group of stakeholders by MDE.

Documentation Handover

ALP and Panorama will provide MDE with access to all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan. These documents will be provided in the electronic format of MDE's choosing (i.e. - Google files, Microsoft online files, etc.) as well as in print format. Printed documents will be provided to MDE via mail carrier with a tracking number to confirm delivery to the contact and mailing address of MDE's choosing.

Training Session

Training for staff regarding how to use the project management platform and collaborative tools to monitor and track the implementation and progress of the strategic plan will be conducted in the [Phase 4 workshops](#). Additionally, ALP will create an instructional video for navigating the project management platform and monitoring progress to serve as a reference tool for staff.

Timeline: ALP 2 Remote Consulting Days

Deliverables: Final Presentation and Training

Phase 2: Implementation and Monitoring Plan

Implementation Roadmap

ALP in partnership with MDE will develop a roadmap that outlines the steps needed to implement the strategic plan over the course of the plan timeline. This implementation roadmap will include:

- Key Milestones: Major phases defined and outcomes
- Task Breakdown: Specific tasks and responsible parties under each milestone
- Resources and Support: A detailed list of the resources required to achieve each milestone
- Dependencies: Any interdependencies between tasks or phases will be identified
- Deliverables: The expected outputs for each phase will be clearly defined

The implementation roadmap will be drafted during the [Phase 4 workshops](#) and refined after ratification of the strategic plan by the board. MDE will utilize the project management tool to monitor the strategic plan implementation and to track progress towards goal achievement.

Monitoring and Reporting Mechanism

ALP will provide [comprehensive training](#) to MDE staff on utilizing the selected project management platform to regularly monitor the progress of the strategic plan and scorecard. The monitoring plan will include:

- Performance Indicators: Measurable success criteria for each milestone
- Monitoring Frequency: Recommendations for how often progress should be reviewed
- Roles and Responsibilities: Assignments for monitoring responsibilities
- Feedback Mechanisms: A description of how ongoing feedback will be collected and incorporated
- Course Correction Plans: Contingency plans for addressing what to do if progress deviates from the roadmap

- Documentation and Reporting: Specification of how progress will be documented and communicated

The training will include best practices for tracking Key Performance Indicators (KPIs) and creating real-time progress reports. Staff will gain hands-on experience with platform features, such as task assignments, milestone tracking, and progress visualization through dashboards.

To support consistent progress reviews, ALP will design customized reporting templates tailored to the unique requirements of different stakeholder groups. These templates will guide staff in preparing monthly, quarterly, and annual reports that highlight key metrics, achievements, and areas requiring intervention. The reports will focus on both formative data (ongoing progress) and summative outcomes (end-goal achievements), ensuring that adjustments to implementation strategies can be made as needed. To further enhance transparency and stakeholder communication, ALP will assist in developing visually engaging, community-facing dashboards that provide an accessible overview of progress toward strategic objectives.

This multi-faceted approach ensures that MDE leadership and stakeholders remain informed and engaged, with the ability to make timely, data-driven decisions to sustain the strategic plan's momentum.

Review and Adjustment Protocol

ALP will establish a structured feedback loop through 2 data review meetings, where project leads can assess milestone completion, resolve roadblocks, and update priorities. ALP will schedule these two checkpoints with MDE in 3 month intervals between October 1, 2025 and April 1, 2026 to level set with MDE key staff on tracking and monitoring goal progress.

Timeline: ALP 5 Remote Consulting Days

Deliverables: Implementation Roadmap, Monitoring and Reporting Protocols

COMPONENT 2: ADMINISTRATION

Resumes/CVs

[Yumna Ahmed](#), ALP

[Danielle Boucher](#), Panorama

[Alex Denison](#), ALP

[Dr. Katherine Fodchuk](#), ALP

[Kylie Hand](#), ALP

[Gracie Kaul](#), Panorama

[Kristi Orange](#), Panorama



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

February 5, 2025

Date

Amos Fodchuk

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: _____

Title: _____

Signature: _____ Date: _____



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) “Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.”

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6**: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- Align with the identified Strategic Goals,
- Be measurable metrics,
- Include stakeholder input,
- Should utilize performance data.

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030: https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

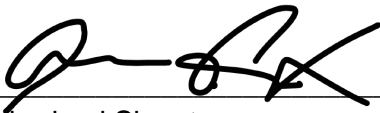
Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

February 5, 2025

Date

Amos Fodchuk

Printed Name

YUMNA NAJAM AHMED

Vancouver, British Columbia, V5X 2M3

902.989.4074

[Linkedin](#)

yumnaahmed1@hotmail.com

PROFILE

Dedicated Industrial and Organizational Psychology MSc practitioner with a specialization in psychometrics and a profound commitment to Diversity, Equity, and Inclusion (DEI). Proven expertise in the development, validation, and analysis of psychometric assessments, combined with advanced skills in statistical analysis using R and SPSS. Passionate about leveraging evidence-based research to foster equitable assessment practices and enhance organizational effectiveness. Proficient in designing and implementing psychometric tools and student assessments, transforming complex dataset analyses into actionable strategies. Adept at managing high-stakes assessment projects, ensuring precision, security, and timely reporting of results.

SKILLS

- **Assessment Development and Delivery:** Expertise in creating, scoring, and analyzing high-quality assessment materials including workplace-based assessments.
- **Coding and Data Analysis:** Excellent coding skills in R for analyses and simulations; proficient in Python and Tableau.
- **Test Development and Security:** Background in test development with experience in Generative AI, Large Language Models, and Item Generation.
- **Data Visualization:** Proficient in transforming complex data into clear visualizations using tools like Microsoft Power BI.
- **Psychometric Analysis and Test Development:** Expert in using both Classical Test Theory (CTT) and Item Response Theory (IRT) for the creation and validation of equitable testing instruments.
- **Advanced Research Methodologies:** Proficient in quantitative and qualitative research techniques, data collection through surveys, interviews, focus groups, and observations.
- **Advanced Data Analysis:** Experienced in SPSS, Excel and R for descriptive statistical analysis, data structuring, and cleaning. Skilled in translating data findings into comprehensible reports and visualizations.
- **Technical Reporting:** Exceptional ability at distilling complex analytical findings into clear, concise, and actionable insights. Extensive experience in creating technical documents, manuals, and research papers, along with aptitude for tailoring communications for diverse audiences.
- **Project Management:** Demonstrated success in leading multifaceted projects from inception to delivery, with keen attention to aligning with strategic goals. Proficient in coordinating cross-functional teams, managing timelines, and fostering stakeholder engagement to achieve targeted outcomes.
- **Stakeholder Engagement:** Skilled in communicating complex psychometric concepts to diverse audiences, facilitating data-driven decision-making processes.
- **Compliance and Security:** Proficient in ensuring high-security, technology-enabled processes for handling sensitive assessment data. Experienced in maintaining the confidentiality and integrity of examination and assessment results.
- **Continuous Improvement:** Committed to participating in continuous improvement initiatives for program assessment and curriculum development.
- **SQL and Database Management:** Proficient in using SQL for database queries and management, gained through experience at MAKI People.
- **Survey Design and Programming:** Experienced in designing, programming, and conducting surveys, with relevant experience from thesis research, EDIA roles, and MAKI People.

EDUCATION

Master of Applied Science: Industrial/ Organizational Psychology
SAINT MARYS UNIVERSITY, Halifax, Canada

Sep 2022 – April 2024
CGPA 4.0

- Received Faculty of Graduate Studies & Research (FGSR) Fellowship

YUMNA NAJAM AHMED

- Focused on psychometrics, personnel psychology, ethics and professional practice and advanced statistical analysis, achieving a CGPA of 4.0.
- Awarded a Teaching Assistantship, demonstrating strong communication and instructional skills.
- Conducted multi-phase research on game-based assessments and interview anxiety and performance amongst individuals with and without autism.

Post Magisterial Diploma: Clinical Psychology

Sep 2015- July 2017

BAHRIA UNIVERSITY, Karachi, Pakistan

- Concentrated on psychological assessment, therapy, and test construction, including training in quantitative analysis methods, with a CGPA of 3.74.
- Developed expertise in survey design, analysis, and delivery of results, relevant for assessment development.

Bachelor of Science: Majors: Psychology

Sep 2011- May 2015

SZABIST, Karachi, Pakistan

- Developed foundational knowledge in psychological principles and research methods, graduating with a CGPA of 3.24.
- Completed projects involving statistical analysis and research methodologies, laying the groundwork for advanced psychometric analysis skills.

WORK EXPERIENCE

Psychometrician

September 2023 – April 2024

MAKI People, Vancouver British Columbia

- I led the development and validation of a wide range of psychometric assessments for global clients like Grant Thornton, PwC, H&M, and Deloitte. This initiative significantly expanded our offerings and contributed to a projected revenue showcasing the power of integrating scientific methods into product development.
- I employed a variety of advanced statistical methodologies—including Exploratory Factor Analysis (EFA), Confirmatory Factor Analysis (CFA), and Item Response Theory (IRT), and SQL via R, SPSS, and Big Data analytics—to enhance the reliability and validity of assessment tools. This approach ensured the delivery of high-quality, data-driven solutions capable of supporting diverse client needs and facilitating informed decision-making processes.
- From creating items to authoring technical manuals, I managed the entire product development cycle. This resulted in the successful launch of scalable assessments, including nonverbal reasoning tests, executive assistant tests, retail sales foundation tests, and customer orientation tests.
- I simplified complex psychometric data for various departments, making it easy for stakeholders to understand and use the findings in strategic initiatives. I also prepared comprehensive reports and scorecards for different assessments, ensuring data was presented clearly and accurately.
- I authored technical manuals and published results, elevating the company's standing in the field, and leading to potential revenue increases. This role required meticulous attention to detail, high precision in data handling, and a commitment to maintaining the confidentiality and security of sensitive data.
- I produced detailed visualizations using Microsoft Power BI, transforming quantitative data into clear and descriptive visualizations such as graphs, tables, and dashboards, meeting the requirements for producing data visualizations.

Research Analyst: Psychometrics and Data (Intern)

May 2023 – September 2023

MHS Assessments, Vancouver, British Colombia - Remote

- I leveraged R to conduct pivotal research in emotional intelligence and personality assessment, delivering insights that directly contributed to the enhancement and revenue increase of the EQI 2.0 product. My work underscored the essential role of sophisticated statistical analyses in translating complex data into strategic asset for product development and market competitiveness.

YUMNA NAJAM AHMED

- I produced and released five white papers on the impact of emotional intelligence (EI) on leadership and workplace dynamics. These papers emphasized EI's significance in organizational success and its role in leadership development. My ability to convert complex research into actionable strategies was crucial in this role. This showcases my ability to write analytic documents for a wide range of audiences.
- I performed detailed item analysis and compiled comprehensive performance reports for the EQI 2.0. This involved ensuring data integrity and reliability, which is vital for maintaining the quality of assessment tools.
- I showcased conscientiousness, responsibility, and independence in carrying out data analyses with minimal supervision, while maintaining a high degree of flexibility and adaptability to meet changing demands and timelines in a research-intensive environment.
- I utilized SPSS and R for statistical analysis, ensuring data integrity and reliability in the creation of detailed and accurate performance reports for stakeholders. This experience underlines my expertise in data integrity and reliability, key components in any assessment or methods specialist role.

Research Analyst: Interviewer

September 2023-April 2024

Nova Scotia Centre on Aging, Mount Saint Vincent University

- Led structured virtual interviews and data collection efforts focusing on work life quality within long-term care settings. By applying Computer-Assisted Personal Interviewing (CAPI) methodologies, I ensured the accuracy and reliability of data capture, which is crucial for developing robust assessments and evaluations.
 - Through this role, I gained unique insights into the mental and physical health, job satisfaction, burnout, and work engagement among LTC staff. This experience helped me develop a nuanced understanding of healthcare work environments and their impact, which is directly applicable to researching and evaluating factors that influence employee well-being and performance.

Occupational Health and Safety Outreach Coordinator

September 2022- April 2023

CN Centre, Saint Mary's University

- I significantly increased the CN Centre's visibility and impact through the development of a comprehensive website content strategy. Focused on enriching the site with engaging Occupational Health Psychology (OHP) and Occupational Health and Safety (OHS) content, thereby enhancing the center's educational outreach and online presence.
- I contributed to revising the Workers Compensation Board (WCB) NS policy by supplying critical OHS insights and actionable recommendations. My contributions underlined the importance of data-driven decision-making in policy enhancement, ensuring that governmental guidelines align with best practices in occupational health and safety.
- I collaborated on a project under Construction Safety NS, conducting in-depth research on construction-related injuries, fatalities, and accidents. This pivotal work laid the groundwork for developing and advising on evidence-based safety recommendations, similar to how one would develop and refine assessment tools and methodologies.
- I mobilized university faculty and students to organize and participate in the "Steps for Life" fundraising event, supporting families affected by workplace tragedies. This initiative showcased my exceptional teamwork and community engagement skills, essential for collaborative projects in any research setting.
- I authored and presented a comprehensive proposal for the CN Centre, effectively communicating our mission and the significance of OHP. I also crafted presentations to raise awareness about workplace fatalities across Canadian provinces, demonstrating my ability to develop and deliver clear and impactful reports and presentations.
- I collaborated with subject matter experts worldwide to organize and host seminars on pivotal OHP topics, including "Supporting Sustainable Return to Work Among Workers with Mental Health Programs," "Disability Employment Awareness Month," and "Workplace Safety Climate and Leadership." These seminars not only broadened our educational reach but also positioned CN Centre as a thought leader in these critical areas of OHP. This experience is analogous to developing training and workshops for assessment methodologies.
- Through these diverse roles and initiatives, I deepened my expertise in project coordination and occupational health psychology. I gained a practical and robust understanding of workplace health and safety challenges, skills that are directly applicable to managing and coordinating assessment and research projects.

Equity, Diversity, inclusion Applied Scientist

May 2023 – September 2023

YUMNA NAJAM AHMED

Supervisor: Dr Lucie Kokum, Saint Mary University, Halifax, Nova Scotia

- I conducted an in-depth analysis of the EDIA winter survey, evaluating students' and faculty's perspectives on inclusion, racism, discrimination, and disability. This role showcased my ability to design and analyze surveys, transforming data into actionable insights, which is directly applicable to developing and delivering effective assessments.
- Utilized R and IBM SPSS for quantitative data analysis to address EDIA challenges, translating complex data into clear, strategic recommendations for policy reform. This experience demonstrates my capability to leverage data-driven insights for evidence-based decision-making, a core requirement for any assessment role.
- Utilized lived experience and quantitative analysis to enrich research, underscoring the importance of diverse perspectives in developing inclusive and effective policies. This commitment to diversity, equity, and inclusion ensures fair and comprehensive assessment practices.
- I prepared detailed reports and presentations on survey findings, offering stakeholders clear and actionable recommendations to enhance inclusion and reduce discrimination within the university. My ability to communicate complex data effectively is crucial for creating impactful assessments and evaluations.
- I worked closely with faculty and administration to implement policy changes based on survey insights, demonstrating a proactive approach to continuous improvement in educational settings. This collaborative experience is vital for working with stakeholders in developing and refining assessment tools.

Research Assistant (Asynchronous Video interviews and Impression Management)

Sep 2022 – April 2023

Supervisor: Dr Nicolas Roulin, Saint Mary University, Halifax, Nova Scotia

- Analyzed job candidates' responses using standardized BARS, contributing to the enhancement of interview question effectiveness and fairness.
- Employed meticulous item analysis on interview video data to advance the development of the Automated Video Interviewing platform (VIPP).
- Delivered research findings to optimize VIPP's performance, impacting the quality of candidate assessments.

Graduate Teaching Assistant

Sep 2022 – April 2024

Saint Mary University, Halifax, Nova Scotia

- Facilitated course instruction and provided personalized support, significantly enhancing the academic performance of undergraduate psychology students courses include introduction to psychology, organizational psychology and research methods.
- Maintained and managed grading databases, ensuring accurate recording of coursework and examination results
- Participated in individual and group tutoring sessions to students.
- Delivered personalized educational, behavioral and emotional support to individual students to enable positive learning outcomes.

Knowledge Translation Research Assistant

Sep 2022 – April 2023

Supervisor: Dr Debra Gilin, Saint Mary University, Halifax, Nova Scotia

- I led data management and performed complex analyses using SPSS, Excel, and Jamovi, focusing on projects centered around occupational health. This included dissecting patterns and trends to inform strategic approaches to health and wellness interventions.
- Played a key role in the design and execution of seminars, webinars, workshops, and public lectures aimed at disseminating research findings across academic and professional landscapes, enhancing community engagement and knowledge exchange.
- Contributed effectively to the production of academic materials by assisting in editing, creating tables and graphs, conducting comprehensive literature searches, and ensuring manuscript readiness for scholarly journal

YUMNA NAJAM AHMED

submissions. This work was instrumental in advancing the understanding of occupational health issues and potential intervention strategies.

College Teacher: Psychology/ Sociology

Alpha College, Karachi, Pakistan

Sep 2018 – June 2022

- Facilitated learning for over 100 A-level students in sociology and psychology, demonstrating the capacity to distill complex topics into understandable content, a skill transferable to developing and delivering training within corporate settings.
- Managed classroom environments under tight deadlines and in a fast-paced setting, mirroring the ability to handle project timelines and pressures within an organizational context efficiently.

Psychological Assessment and Counselling Specialist

PNS Shifa Hospital, Karachi, Pakistan

Sep 2015 – June 2016

- I conducted thorough behavioral health assessments and facilitated up to eight individual therapy sessions weekly. This role allowed me to contribute significantly to the mental and emotional well-being of a diverse client base, including both young and adult clients.
- I developed and implemented tailored therapeutic programs to address the unique psychological needs of each client. This experience demonstrated my ability to provide personalized care and attention, ensuring that each individual's needs were met effectively.

PROJECT EXPERIENCE

Talent Assessment Project

Babcock Canada, Toronto, Ontario

Sep 2022 – Dec 2022

- Executed a comprehensive job analysis, resulting in refined job descriptions and enhanced assessment processes for the Quality Assurance Specialist role.
- Designed an evidence-based personnel selection process, incorporating structured interviews and situational judgment tests, which improved recruitment efficiency and predictive validity.
- Produced an in-depth assessment report for the client, enhancing the recruitment strategy's effectiveness.

Validation of Inclusive Organization Scale

Supervisor: Dr Arla Day, Saint Mary University, Halifax, Nova Scotia

Sep 2022 – Dec 2022

- Devised an Inclusive Leadership Scale assessing organizational inclusivity, deploying rigorous validity and reliability tests to ensure psychometric soundness.
- Aided in the preparation and delivery of stakeholder reports and presentations, facilitating the adoption of inclusivity practices. Presented the findings at Canadian Psychological Association conference in Toronto.

CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

Business Ethics: LinkedIn Learn

July 2023

Worker Health and Safety Awareness Training: Ontario Government

May 2023

Research Ethics: Government of Canada

Sep 2022

YUMNA NAJAM AHMED

Katherine M. Fodchuk, Ph.D.

Advanced Learning Partnerships, Inc. Chapel Hill, N.C.

katy@alplearn.com

SUMMARY

Industrial/organizational psychologist with 25 years of broad experience and deep consulting expertise in areas including: educational systems, organizational leadership, workplace wellness, strategic planning design and implementation, educational program evaluation, talent development systems, psychometrics, test validation and development, EEO litigation support, and organizational change management. Research areas include educator effectiveness and retention; perceptions of organizational justice (fairness) across cultures; performance evaluation; employee selection; innovation implementation, and educator professional development.

PROFESSIONAL EXPERIENCE

Advanced Learning Partnerships, Inc. (2017-Current)

Executive Director, Organizational Development

Leads ALP's Organizational Systems team and sits on the Executive Leadership (360 Team) and Business Development Team. Leads design and implementation of ALP's organizational development consulting services including competency modeling, strategic planning, program impact, workplace wellness, action-based talent development, and organizational leadership consulting. Leads the development and implementation of employee recruitment and selection processes, employee talent development system, and alignment with strategic priorities. Supports ALP team to ensure service delivery quality through design and implementation of ALP's partner feedback metrics, data analytic tools, and dashboards. Builds data collection, reporting and analysis tools for district partners including coaching tools for educators, program evaluation, surveys, metrics design, reporting and data dashboards.

Director, Research and Organizational Development (2011-2017)

Description: Leads research to document ALP professional learning services' impact in school districts; development and validation of online coaching/educator evaluation tools, dashboard, and reporting systems surrounding innovation, technology integration, action research and creativity; funding procurement: RFP and grant development; development of internal structure, evaluation, and processes surrounding coaching and professional learning services and ALP employee performance and talent management system.

VIF, International Education (Now Participate Learning) (2008-2011)

Director of Teacher Quality and Director of Program Research and Evaluation

Description: Development, validation, and implementation of a global selection process for international educators hailing from 30+ countries for the largest U.S.-based educator exchange program; development and integration of teacher workforce data and survey feedback into strategic selection, professional development, training and expatriate support systems and processes; directed highly performing teams across Teacher Selection/Admissions and Support departments (head of Teacher Quality division), lead development and evaluation of language and cultural awareness programs.

Contract Consulting (2004-2008)

Clients/Partners: Paris Phoenix Group, Limeade, Microsoft, T.S. Designs, VIF International Education

Projects: Validation of workplace well-being measure; research-based recommendations and change model for a large software company surrounding the merger and acquisition process when the goal is talent retention; criterion

validation of leadership and executive team leadership measures for consulting firm; organizational diagnosis, intervention, and evaluation plan for manufacturing company that was shifting to a sustainable business model.

California State Personnel Board (2002-2004)

Test Validation and Development Consultant

Description: Management of numerous projects involving large scale data collection, occupational and job analysis, competency modeling, and selection system development for positions in various California state agencies. Lead and facilitate complex projects and work of key stakeholders (e.g., executive officers, commissioners, board members, managers, subject matter experts, etc.) to develop and implement new selection systems, training objectives, and performance standards. Lead inter-agency training seminars for state selection analysts' certification program on principles of test validation, job analysis, and statistics in personnel selection.

Biddle Consulting Group, Inc. (1998 – 2001)

Position: Consultant

Description: Project management in litigation support in the areas of selection system validation, alternate employment practices, disparate impact analysis, EEO case law research, reduction-in-force analysis, declaration/legal document writing; management of large-scale compensation audit review; development of statistical analysis software for examination of equity in employee compensation.

ACADEMIC POSITIONS

Old Dominion University, Norfolk, VA

Darden School of Education, Programs for Research and Evaluation in Public Schools (2006-2008)
Graduate Research Assistant: Implementation of instructional change intervention involving professional development for educators; use of process consultation for needs identification; learning teams; development of integrated and formative evaluation of intervention; grant writing.

Graduate Teaching Assistant: GEN 101 - Global Environment (2004-2005)

Psychology Department

Adjunct Lecturer: Psychology 345 - Organizational Psychology (Fall 2005)

INSITE Research Assistant: NSF Grant –“Creating an Inclusive Learning Environment: Enhancing Retention of Women and Minorities in Computer Science” (2004-2005)

California State University, Sacramento

Instructor: Psychology 1-Basic Processes (Spring 2001)

EDUCATION

Old Dominion University, Norfolk, VA

Ph.D., Psychology (December 2008)

Minor: International Studies

California State University, Sacramento

Master of Arts in Industrial/Organizational Psychology (January 2003)

Fulbright Scholar to France (Université de Nice, Sophia Antipolis, 2001-2002)

California Polytechnic State University, San Luis Obispo

Bachelor of Science in Psychology (March 1998)

Minor: French

PUBLICATIONS

- Fodchuk, K. M., & Hu, X. (2024). Understanding the full journey from burnout to wellness: How and why we must address educator burnout at a systems level. *Wellness Education Magazine: Headwater Foundation*. 1(2).
- Ren, H., Yunlu, D. G., Shaffer, M., & Fodchuk, K. M. (2021). Thriving and retention of expatriates: Cultural intelligence and organizational embeddedness inputs. *International Journal of Cross-Cultural Management*, 21(2).
- Yunlu, D.G., Ren, H., Mohler Fodchuk, K. and Shaffer, M. (2018), "Home away from home: community embeddedness and expatriate retention cognitions", *Journal of Global Mobility*, Vol. 6 No. 2, pp. 194-208. <https://doi.org/10.1108/JGM-10-2017-0045>
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- Ren, H., Shaffer, M. A., Harrison, D. A., Fu, C., & Fodchuk, K. M. (2014). Reactive Adjustment or Proactive Embedding? Multi-Study, Multi-Wave Evidence for Dual Pathways to Expatriate Retention. *Personnel Psychology*, 67, 203 – 239.
- Fodchuk, K. M., & Sherman, H. D. (2008). Procedural justice and French and American performance evaluations. *Cross Cultural Management: An International Journal*, 15, 285-299.
- Fodchuk, K. M. (2007). Work environments that negate counterproductive behaviors and foster organizational citizenship: Research-based recommendations for managers. *The Psychologist-Manager Journal*, 10, 27–46.
- Davis, D. D., Major, D. A., Sanchez-Hucles, J. V., DeLoatch, S. J., Selgrade, K. A., Meert, S. K., Jackson, N., Downey, H. J., & Fodchuk, K. M. (2006). Enhancing inclusion in computer science education. In E. M. Trauth (Ed.), *Encyclopedia of gender and information technology* (pp. 269-274). Hershey, PA: Idea Group Reference.
- Fodchuk, K. M. & Sidebotham, E. J. (2005). Procedural justice in the selection process: A review of research and suggestions for practical applications. *The Psychologist-Manager Journal*, 8, 105 - 120.
- Stillson, C. S. & Mohler, K. M. (2001). History still in the making: the continual struggle for equal pay. *World at Work Journal*, 10(1), 28 – 37.

CONFERENCE PAPERS/PRESENTATIONS

- Fodchuk, K. F. & Shareski, D. (2023). Educator Overwhelm: Factors Influencing Burnout in School and Turning the Tide Toward Wellness. Presented at the ULead Conference (Alberta Teachers Association and Council on School Leadership) in Banff, Alberta, Canada.
- Fodchuk, K.F. (2023). Leadership Strategies for Addressing Educator Burnout. Ontario Educators’ Professional Learning Series (OECM). Virtual Venue.
- Fodchuk, K.F. (2022). Take Your Day Back: Leveraging Planning Technologies to Optimize Meetings. *Presented at the InTech Conference - Cobb County School District, Marietta, GA.*
- Fodchuk, K.F. (2022). Reducing Burnout in Your School or District: Practical Strategies for Education Leaders. *Presented at the InTech Conference - Cobb County School District, Marietta, GA.*

- Fodchuk, K.F. (2021). From Burnout to Thriving: Emerging Stronger Together. InTech Conference - Cobb County School District, Virtual Venue.
- Fodchuk, K.F. Kennedy, C., Lyman, G. & Stanfill, M. (2020). Designing Learning for Professional Growth. Learning Forward Conference (Virtual Venue).
- McMurray, C., Fodchuk, A., Lyman, G. & Fodchuk, K.F. (2017). Nurturing Organizational Growth in a Personalized Learning Model. Learning Forward Conference, Orlando, FL.
- Simms, L., Fodchuk, K.F. Patin, M. & Lyman, G. (2017). Capturing Professional Growth in the Coaching Cycle. Learning Forward Conference, Orlando, FL.
- Ren, H., Yunlu, D. G., & Fodchuk, K. (2014). Home away from home: The role of community in expatriate work engagement. *Presented at the Society for Industrial/Organizational Psychology Annual Conference in Honolulu, HI.*
- Ren, H., Yunlu, D. G., & Fodchuk, K. (2012). Engagement of self-initiated expatriates: Personality and information seeking. *Presented at the Society for Industrial/Organizational Psychology Conference in San Diego, CA.*
- Ren, H., Yunlu, D. G., Fodchuk, K., & Shaffer, M. (2011). Cultural Intelligence, role clarity, and thriving: Implications for self-initiated expatriate experiences. *Academy of Management Annual Meeting, San Antonio, TX.*
- Ren, H., Fodchuk, K.M., & Miller, G.J. (2010). A proactive perspective on expatriate retention. *Academy of Management Annual Meeting Symposium, "More than Once in a Lifetime: Individuals' Transitions across Role, Career, Cultural and Geographical Boundaries," Montreal, Quebec, Canada.*
- Fodchuk, K. M., & Myran, S. (2009). Comparing participation, commitment, and support for change in two formative assessment professional development settings. *American Educational Research Association Annual Conference in Chicago, Ill.*
- Myran, S., Burke, M., Fodchuk, K., & Baker, P. (2009). From Alex's school to Harriet's: Lessons from one assessment for learning partnership to another. *American Educational Research Association Annual Conference in Chicago, Ill.*
- Fodchuk, K. M. & Liu, Y. (2008). Chinese organizational justice judgments: Developing adaptable measures for use in both emic and etic contexts. *Academy of Management Annual Meeting symposium, "Approaches to Validating Measures for the Chinese: Aligning Strategy and Purpose,"* (Fodchuk was symposium coordinator).
- Fodchuk, K. M., Myran, S., & Robinson, J. (2008). Momentum for change: Examining the relationships among teacher participation level, commitment to change, and behavioral support for change. *American Educational Research Association Annual Conference in New York City, NY.*
- Fodchuk, K. M., Liu, Y., & Qiu, J. (2007). Organizational Justice in China: Results from a Qualitative Analysis. *Paper presented at the American Psychological Association Conference in San Francisco, CA.*
- Fodchuk, K. M., & Downey, H. J. (2007). Instrumental and Noninstrumental Voice and Procedural Justice in French and American Performance Evaluations. *Presented in the International Organizational Behavior symposium at the Academy of Management Conference in Philadelphia, PA.*
- Fodchuk, K. M., Yan, G., Zhang, Z., Liu, Y., Wei, R., & Li, X. (2006). Culture-Specific Criteria in Chinese Organizational Justice Judgments. *Paper presented at the "Business as an Agent of World Benefit: Management Knowledge Leading Positive Change." Conference hosted by the Academy of Management and the United Nations at Case Western Reserve University in Cleveland, Ohio (October 23 – 25, 2006).*
- Fodchuk, K.M., Davis, D. D., Downey, H. (2006). Group-Level Analysis of Innovation Implementation Effectiveness. *Paper presentation for the Society of Industrial/Organizational Psychology Conference in Dallas, Texas in May 2006.*

Fodchuk, K.M. (2004). *Promoting Fairness in Assessment and Other Employment Practices*. Presented at the Personnel Testing Council of Northern California Annual Spring Conference. Emeryville, CA.

Mohler, K.M. (2000). *How to Address Both OFCCP and Title VII Burdens in Pay Equity Analyses*. Presentation at American Association for Affirmative Action 26th Annual Conference, Washington D.C.

GRANTS, AWARDS, SERVICE

Mathkind, Board Member (2024-Current).

Advisory Board Secretary, Healing Pines Respite (2019-Current).

Nominated and selected to participate in the Academy of Management Annual Meeting's Organizational Development and Change Doctoral Student Consortium (Philadelphia, 2008).

First alternate for the **National Science Foundation's** East Asian Pacific Summer Institute. Funding for dissertation research conducted in China (Summer 2006) awarded by Old Dominion University's College of Sciences and Dragus International Center.

Fulbright Advanced Student Scholarship (2001-2002): Université de Nice, Sophia-Antipolis (Dirk Steiner, Host Professor). Research was conducted for master's thesis at CSUS and included a cross-cultural investigation of structure and procedural justice perceptions of performance appraisals in French and American organizations.

Preparing Future Faculty Steering Committee, Old Dominion University 2006-2008

Reviewer *Organization and Group Management Journal* (2007)

Personnel Testing Council of Northern California (Secretary 2003-2004)

Certified Selection Analyst – California State Personnel Board (2003)

Certified Mediator – Conflict Resolution Program of the Central Coast (1998)

AFFILIATIONS

Society for Industrial/Organizational Psychology

American Psychological Association

Academy of Management

American Educational Research Association

ASCD (Association for Supervision and Curriculum Development)

Fulbright Alumni Association

Fulbright North Carolina Regional Chapter

Personnel Testing Council of Northern California



Kylie E. Hand

KylieElizabethHand@gmail.com | 724. 777. 2134

Professional Portfolio: linktr.ee/kyliehand

With a background in professional leadership, public management, & civic engagement, my journey from the classroom to consulting underscores my commitment to advancing high-quality, innovative learning across diverse audiences. I now seek to contribute my influence & skillset, including my business analytics & learning design mindset, for expanded impact within the industry.

EDUCATION

- Drexel University, Philadelphia, PA** 2018 – 2019
Educational Leadership & PA School Principal Certification (K-12)
- Carnegie Mellon University, Pittsburgh, PA** 2013 – 2016
Master of Public Management from H. John Heinz III College
Graduated with Highest Distinction Honors
- Duquesne University, Pittsburgh, PA** 2007 – 2011
B.S., Elementary Education (K-6) / Early Childhood Education (N-3)
Instructional Technology Specialist Certification (K-12)

LEADERSHIP & SUPERVISORY EXPERIENCE

- Chester County Intermediate Unit (CCIU), Downingtown, PA** 2020 – Present
Director of Learning Design & EdTech / Director of STEM & Online Learning
Coordinator of Online Learning
A PreK-12 educational service agency administrator, propelling change in school districts across PA through collaborative, high-quality, innovative professional learning, leadership, & partnership for district stakeholders.
- **Leadership:** entrepreneurial revenue-generating services, data analysis, budgets & grants, vendor partnerships, project management, key leader/member of statewide committees
 - **Human Resources:** recruit, hire, onboard, coach, mentor, supervise, foster a collaborative & high-achieving work culture of continuous improvement & innovation
 - **Professional Learning Concentrations:** online & blended learning, personalized & competency-based education, STEM, artificial intelligence (AI), edtech integration, gifted, data science, spatial design, maker education, certification & endorsement programs
 - **Professional Learning Delivery:** customized, proposal-based, short/long-term, online/in-person, cohorts, events, coaching, courses, workshops, conferences, & networks
- Brentwood Borough School District, Pittsburgh, PA** 2016 – 2017
Coordinator of Instructional Technology & Innovation
K-12 District Administrator providing leadership for infrastructure & instructional technology integration, STEM, blended learning, spatial design, maker education, & strategic partnerships for district stakeholders.
- **Leadership:** budgets & grants, community partnerships, oversight of school district technology budget, creation of new policies & procedures for hardware / software usage & electronic communications, professional development, IT management, strategic planning

CLASSROOM INSTRUCTIONAL EXPERIENCE

Managed the instruction of heterogeneous classrooms through hands-on approaches while serving as the lead-teacher & annually earning a "Distinguished" rating by administrators.

Kutztown Area School District, Kutztown, PA

2017 – 2020

Teacher – Grade 1

- **Classroom Teacher Leadership:** District Literacy (Co-chair), Elementary Equity (Co-chair), Building Public Relations (Co-chair), After-School Literacy Tutoring (Co-coordinator), Member of Superintendent's Teacher Leadership Institute, Special Education Planning, District Comprehensive Plan, Building-level Instructional Leadership Team

Chartiers Valley School District, Pittsburgh, PA

2012 – 2016

Teacher – Grade 2

- **Classroom Teacher Leadership:** Building-level Instructional Leadership Team, Math Curriculum, Emotional Support, & Parent Engagement

Quaker Valley School District, Sewickley, PA

2011 – 2012

Teacher – Grade 3, Long Term Substitute

- **Classroom Teacher Leadership:** Assembly Coordinator & ASSET Science Online Leader

PERFORMANCE ACHIEVEMENTS

Demonstrations of positive impact on schools through commitment, collaboration, & excellence.

- Leader of successful application for CCIU to be selected as the fiscal agent for the \$3.5 million federal JAVITS grant: PA Gifted Equity Initiative
- Strategically led Divisional goal, resulting in a 78% increase in enrollment of Center for Advanced Professional Studies (CAPS) programming over 2 years
- Conducted a meticulous financial analysis & implemented strategic pricing initiatives, achieving an ongoing annual revenue increase of at least \$30,000 for CAPS programming
- Collaboratively developed comprehensive professional learning initiatives & partnerships with at least 45 school districts, ensuring the highest standards of instructional quality
- Oversaw multiyear instructional design for the UPenn Chester County Consortium for Mental Health & Optimal Development, showcasing a commitment to high-quality performance
- Co-hosted the influential PA Regional Instructional Tech Collaborative, fostering collaboration & knowledge exchange with individuals from across at least six counties
- Conducted rigorous instructional tech audits for school districts
- Established District's first technology strategic plan at Brentwood Borough School District

NOTABLE CONTRIBUTIONS

Illustrations of local, state, & national invitations to contribute professional leadership.

- Selected to lead the PA Department of Education statewide Student-Centered Learning Network with a May 2024 Kickoff that had 170+ attendees representing all regions within state
- Selected to co-present on artificial intelligence (AI) at PA Department of Education SAS Institute with Special Consultant to the Secretary of Education for STEM & Computer Science
- Commissioned by the PA Department of Education to craft a groundbreaking statewide AI course, freely accessible on the PA SAS Portal for all educators in PA
- Coauthored impactful narratives for a statewide publication on Student-Centered Learning, contributing to thought leadership in the education sector
- Co-planner of the 2024 AI Summit at PETE&C (PA EdTech Expo & Conference)
- Selected to be a project mentor in the CCIU Leadership Development Program for 2 years
- Selected as 1 of 10 innovative classrooms in Pittsburgh for DiscoverED Remake Learning Days

SELECTED HONORS & AWARDS

- Educator Fellow – Center for Integrative Research in Computing & Learning Sciences (2023)
- Parent-Teacher “It Takes a Team” Design Challenge Grant Award – IDEO San Francisco (2019)
- Catalyst Grant Award – Kutztown Area School District (2018)
- Mind, Heart, & Spirit Alumni Award – Duquesne University (2017)
- Western PA Rising Star Award – Get Involved Pittsburgh (2017)
- “Promising Practices Educator” – Character.org's first-ever individual winner (2015)
- Dean’s Teaching Fellow – Duquesne University (2011)
- Faculty Excellence Award: Early Childhood Education – Duquesne University (2011)
- National Education Scholarship – Delta Kappa Gamma (2011)

CIVIC & COMMUNITY LEADERSHIP

- **Board Member**, Pennsylvania Governor's School for the Sciences
Pennsylvania (July 2022 - Present)
- **Advisory Board Member**, K-12 Innovation, Consortium for School Networking (CoSN)
Remote (August 2023 - Present)
- **Volunteer Ambassador**, Mark Cuban Foundation Artificial Intelligence Bootcamp
Philadelphia, PA (June 2023 - Present)
- **Judge**, Milken-Penn GSE Education Business Plan Competition, University of Pennsylvania
Graduate School of Education,
Philadelphia, PA (April 2023 - Present)
- **Co-lead**, AI Summit at PETE&C (PA Education Technology Expo & Conference)
Hershey, PA (2023 - 2024)
- **Finance Committee Member**, West Reading Borough Council
West Reading, PA (2019 – 2020)
- **Planning Committee Member**, Three Rivers Education Technology Conference (TRETC)
Pittsburgh, PA (2018)
- **Board of Directors, Executive Team**, Pittsburgh Urban Management Project (PUMP)
Pittsburgh, PA (2014 – 2017)
- **Host Committee Member**, CubaOne: Bridges to Pittsburgh Fundraiser
Pittsburgh, PA (December 12, 2016)
- **Co-Chair**, Pittsburgh Urban Magnet Project (PUMP) 20th Anniversary Celebration
Pittsburgh, PA (September 2016)
- **Coordinator of Robotics & Policy with City Councilman Dan Gilman** for Carnegie Mellon
University undergraduate robotics researchers
Pittsburgh, PA (July 2016)
- **Committee Member**, Navigating Pittsburgh Summit. Senator John Heinz History Center
Pittsburgh, PA (July 2016)
- **Co-leader**, Connecting Educators Vocational Study Group, North Way Christian Community
Pittsburgh, PA (Monthly 2013 - 2015)
- **Strategic Reviewer**, Carnegie Mellon University Robotics Institute
Pittsburgh, PA (Monthly 2013 - 2015)

Education

Clemson University (Expected: May 2025)
Ph.D. in Learning Sciences

University of South Florida (2022)
M.A. in Industrial Organizational Psychology

Grand Valley State University (2019)
B.S. in Psychology. Minor: Applied Statistics

Relevant Experience

Doctoral Research Fellow | Walter Reed Army Institute of Research | September 2023 – Present

- Led teams of 4-10 research fellows to develop 250 qualitative codes and manually code transcripts from tri-service focus groups to understand key operational and use requirements for objective behavioral health assessment tools
- Developed classification algorithm using exploratory NLP techniques to automatically code focus group utterances into 200 content codes across 19 transcripts, saving over 300 hours of employee time and increasing accuracy by 32%
- Led analysis and co-authored report to senior DHA leadership that provided recommendations for implementing objective behavioral health tools across deployed and garrison settings, and different military populations
- Worked with external funding partners to understand key project goals, deliverables, and timelines
- Utilized IRT and CFA models to assess the quality of the PCL-5 and shortform measures, providing recommendations on classification accuracy and item quality for composite scales and single items
- Developed staff trainings, wrote SOP's, and mentored junior fellows in data cleaning, R, Excel, and qualitative coding

Doctoral Researcher | Clemson University and University of South Florida | August 2019 – Present

- Used supervised machine learning algorithms to assess careless response rates across a longitudinal experience sampling study, classifying 45% of response episodes as careless and finding that personality and time features predict carelessness
- Led a team of 6 graduate students in developing a mentorship program of 40 mentors and 100 undergraduate mentees across two years: supervising material creation, program assessment, completion tracking, and program improvement
- Worked with a team of 4 graduate students to conduct a training needs assessment of the USF orientation leader training program by conducting interviews with 25 program staff to identify gaps in current training, and unmet training needs
- Participated in the Proctor and Gamble Organizational Business challenge and led a team of 4 graduate students to develop and present a proposal for a new assessment system to senior HR leadership
- Led end-to-end development of a cross-institutional survey study to examine whether dark personality traits predict job interests and values, managing all aspects from participant recruitment to data management and analysis

Data Science Intern | Slack | May 2023 – August 2023

- Developed end-to-end ML pipeline to identify the top predictors for adoption and retention of the workflow builder feature across 25+ million users, finding team 'influencers' account for 37% of the variance in workflow use
- Used exploratory NLP techniques to uncover 2 user personas and developed classification algorithms based on job title information, which classified ~80% of users as belonging to one of these personas
- Used NLP techniques to identify the top use-cases for workflows among personas and developed NLP algorithms to identify text posts expressing need for these workflows, with targeted interventions projected to increase usage by 162%
- Worked with cross-functional stakeholders and researchers in product, UX, and survey science to further org-wide persona knowledge and consolidate research into a single truth-source for these personas

Business Analyst Intern | Chegg, Inc. | May 2022 – August 2022

- Built conversion funnel dashboards to track the user journey from first touch to purchase for 10+ million users
- Worked with senior analysts to develop metrics for acquisitions and user retention using supervised machine learning
- Created and presented weekly reports on user behavior, purchasing KPIs, and root cause of changes across 5 products and 4 regions to cross-functional stakeholders in marketing, business, SEO, and finance
- Assisted the finance team in creating quarterly projections for growth, revenue, and ad spend across regions and products
- Created automated ETL jobs for weekly report data pulls using DataBricks that reduced weekly workload by 56%
- Supported 5 teams across the finance, marketing, SEO, and business departments with 25+ requests for data pulls, analysis, visualizations, and interpretation/causal inference using Excel, Amplitude, and R

Relevant Skills

• Experimental and Non-Experimental Hypothesis Testing • Causal Reasoning • A/B Testing • Survey Design and Research
• Data Visualization • Data Storytelling • Mixed Methods Research • Focus Groups, Structured and Semi-Structured Interviews

Analysis Skills

• Linear and Non-linear Regression • Logistic Regression • Decision Trees • SVM • K-Means Clustering • Multilevel, Mixture, and Time Series Modeling • Generalized Additive Modeling • NLP • tfidf • Sentiment Analysis • Topic Modeling

Programming and Technology Skills

• Python • R • PostgreSQL, MySQL • Jupyter Notebooks • Spark • Databricks • Amazon Redshift • Tableau • GitHub • Amplitude • Google Analytics and AdWords • Qualtrics • Confluence • Jira • Microsoft Word • Excel • PowerPoint • Power BI

Publications and Projects in Writing

- Wolf, M. G., & **Denison, A. J.** (2023). Survey Uses May Influence Survey Responses. *Assessment*. doi: 10.1177/10731911231213849
- Denison, A. J.**, & Wiernik, B. M. (2022). Careless Response Processes are Heterogeneous: Comment on Goldammer et al. (2020). *Meta Psychology*. doi: 10.15626/MP.2020.2637
- Wiernik, B. M., Raghavan, M., Allan, T., & **Denison, A. J.** (2022) Generalizability Challenges in Applied Psychological and Organizational Research and Practice. *Brain and Behavior Science* doi: 10.1017/S0140525X21000492. PMID: 35139963.
- Denison, A. J.**, (2022). Prevalence and Predictors of Careless Responding in Experience Sampling Research. *USF Tampa Graduate Theses and Dissertations*. <https://digitalcommons.usf.edu/etd/9341>
- Wolfe, B. M., Williams, J. T., **Denison, A. J.**, & Hart, W. L. (Under review). Verification of Past Beliefs Moderates Belief Change.
- Curran, P. G., & **Denison, A. J.** (In submission). Creating Carelessness: A Comparative Analysis of Common Techniques for the Simulation of Careless Responder Data. Pre-print available at <https://psyarxiv.com/ge6fa/>

Selected Talks and Presentations

- Denison, A. J.***, Recker, R. S., Fleischman, B. A., Wade, J., Guy, J. S., & Reddy, M. K. (August 2024). *Expected and Perceived Usability of a Wearable Device that Monitors Physiological Metrics*. Poster to be presented at 2024 Military Health System Research Symposium, Kissimmee, FL.
- Denison, A. J.***, & Curran, P. G. (April 2023). Symposium: *Recent Advances in Insufficient Effort Responding Research*. Talk presented at 2023 Society for Industrial Organizational Psychology Annual Conference, Boston, MA.
- Denison, A. J.***, & Curran, P. G. (April 2022). Symposium: *Recent Advances in Insufficient Effort Responding Research*. Talk presented at 2022 Society for Industrial Organizational Psychology Annual Conference, Seattle, WA.
- Denison, A. J.*** (November 2020). *Introduction to Industrial Organizational Psychology and Graduate School*. Talk presented at Grand Valley State University Psi Chi, Allendale, MI.
- Denison, A. J.*** (October 2020). *Careless Responding: Reasons and Remedies*. Talk presented at University of South Florida Brown Bag, Tampa, FL.
- Denison, A. J.**, Williams, T. J.*, Monaghanm C., & Wolfe, M. B. (February 2020). *Machiavellianism Predicts Careless Responding if Incentive is Present*. Poster presented at the 21st Annual Society for Personality and Social Psychology Research Conference, New Orleans, LA.
- Denison, A. J.***, Wolfe, M. B., Williams, T. J., Ciagala, K., & Evans, T. (February 2019). *Awareness of Belief Change Predicts Novel Information Seeking*. Poster presented at the 20th Annual Society for Personality and Social Psychology Research Conference, Portland, OR.

* Denotes presenters

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor's bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The Offeror represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's bid or proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

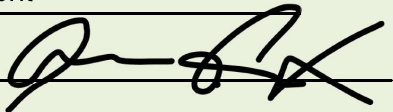
COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Amos Fodchuk

Title: President

Signature: 

Date: February 4, 2025

Modifications or additions to any portion of this document may cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Danielle Boucher, Project Manager

Education

Brown University | *Masters of Arts in Urban Education Policy*

University of Kentucky | *Bachelor of Arts, Spanish with a minor in Business*

Work Experience

Senior Client Success Manager, Panorama Education

2018 – present

- Partners with school districts as a project manager for survey, social emotional learning, and student success projects
- Leads company wide onboarding for new hires to help them understand the Education Landscape and SEL
- Supports three new client success managers as an onboarding partner, and assists others through open and collaborative work style
- Analyzes internal team data to better understand the time necessary to serve different types of districts and projects, aiming to improve efficiencies and inform hiring decisions
- Collaborates with security team and team leadership to address partner district concerns about data privacy

Program Coordinator, EDCO Collaborative

2017-2018

- Implemented federal High School Equivalency Program (HEP) grant providing high school equivalency opportunities to migrant farmworkers in MA and NH through digital curriculums and distance blended learning
- Supported over 30 students in their studies and career planning through regular meetings and progress monitoring
- Developed strategic enrollment procedures and documents and collaborated to adapt program and policies
- Created data management systems for team to monitor student progress towards academic and professional goals
- Analyzed curriculum materials and identified barriers to proactively provide supports for students

Program Leader, Thinking Beyond Borders Ecuador

2015-2016

- Led international South American gap semester program with 14 recent high school graduates
- Supported and mentored students one on one to promote overall well-being and development.

- Taught seminar on international development through the topics of education, sustainable agriculture, and identity

Team Leader, City Year Boston

2013-2014

- Co-managed, supervised, and coached a team of 11 corps members at the Dever Elementary School, a Massachusetts state-designated level 5 dual-language turn around school
- Collected and analyzed academic data to monitor goals for students receiving targeted MTSS interventions
- Monitored 5th grade students' attendance and ensured family accountability as part of the school administration's Attendance Task Force, contributing to a 1.2 percentage point increase in 5th grade attendance from the previous year

Corps Member, City Year Boston

2012-2013

- Mentored and tutored students in attendance, behavior, and coursework in a 4th grade Spanish language classroom
- Planned all event details and logistics for two large events as lead attendance coordinator, rewarding over 300

Gracie Kaul, Senior Account Manager

Education

University of Texas, Austin | *Master of Social Work, Community and Administrative Leadership*

University of Tennessee | *Bachelor of Social Work, Honors*

Work Experience

Senior Account Manager, Panorama Education | 2022-present

- Own the renewal cycle and retain clients across a portfolio of ~25 of Panorama and Mesa's largest clients in NC, SC, GA, TN, and LA
- Support the successful implementation of Panorama's SEL and MTSS product suites
- Build relationships with district and school personnel in order to increase impact and business with existing clients
- Develop account plans and monitor overall client health of portfolio
- Collaborate closely with cross-functional teams to optimize delivery and client satisfaction

Senior Manager, Customer Success, LiveSchool | 2018 - 2022

- Managed portfolio of 800+ accounts and Xm+ ARR through full customer lifecycle including renewals and expansions.
- Oversaw day to day operations of Client Success, Sales, and Product Support to provide an outstanding customer experience and developed strong relationships with all customers
- Drove new feature product adoption through release communications, beta testing, customer adoption, resources, and consultation.
- Managed 4 direct reports using a Radical Candor approach which involved 'caring personally while challenging directly'
- Refined customer onboarding from a one-to-one to a one-to-many approach to sustain company growth while ensuring successful customer self-launch.

Family and Community Partnerships Manager, Metro Nashville Public Schools | 2014 - 2018

- Developed strong relationships with district and school leaders, teachers, students, families, and community stakeholders at 30+ schools with the ultimate goal of improving educational outcomes for all students.
- Produced and facilitated high-quality trainings and events for over 600 families, school staff, and district leaders each year

Middle School Reading Teacher, San Antonio Independent School District | 2011 - 2013

- While incorporating a blended learning program, 87% of my students advanced an

average of 3 grade levels in reading, the highest reading gains in the school. • Voted
New Teacher of the Year for 2011-2012



Kristi Orange

Professional Learning Director

Education

Master of Arts, Organizational Leadership

Teachers College, Columbia University | New York, New York

Bachelor of Arts, English-Writing Emphasis

Hope College | Holland, Michigan

Work Experience

Professional Learning Director, Panorama Education, March 2022 – Present

- Create comprehensive project scopes to ensure effective product implementation, cohesive professional learning plans, and MTSS framework execution in state education agencies and large school districts:
 - Executed state-wide professional learning strategy in partnership with the Iowa Department of Education to successfully integrate Panorama Student Success in all 515 districts; designed and facilitated professional development in alignment with the Department's goals and policies.
 - Envisioned, planned, and led an implementation strategy to embed Panorama Student Success into Durham Public Schools MTSS framework, modernizing the existing model; curated and facilitated all professional development for key stakeholder groups to effectively integrate Student Success into schools within one calendar year.
- Create and deliver tailored, in-person or virtual learning experiences for district and school leaders, educators, counselors, and community partners, prioritizing the diverse needs of adult learners.

Managing Director of Program, Teach For America North Carolina, September 2018 - March 2022 ● Envision, implement, and maintain a reimagined coaching model to provide 200+ teacher-leaders differentiated support and development for professional and personal growth resulting in **91.7%** of teachers agreed/strongly agreed they were provided personalized support, development, and necessary accountability from their coach this year, an **increase of 28.1% over the course of three years, placing our region in the top 5 regions in Teach For America nationally**. Anecdotal data revealed coaching as professional development that was most critical to student achievement outcomes. ● Lead and manage team of 8; curated weekly training and one-on-one differentiated support to grow capacity and skills as leadership coaches resulting in retention of 100% of coaches for the upcoming fiscal year, defying the expected national turnover rate. **100% of coaches met their teacher growth targets and coaching metrics for the first time in years.**

Dean of Instruction, Greenway Park Elementary School (Charlotte, NC), February 2017 - September 2018 ● Established professional development model providing differentiated learning to teachers and to build a coaching culture throughout the school resulting in Insight Survey categories 'Professional Development,' and 'Observation and Feedback' increased over 1.5 points on their respective domain score scales, contributing to the Index Percentile Rank to move from **75% to 91% in one school year**.

- Reinvigorated school culture by designing and implementing several initiatives: secular mindfulness program, redesigned PBIS system, and professional development aligned to school culture goals resulting in **45% decrease** in K-2 discipline incidents, **35% decrease** in 3-5th grade suspensions, **35.4% fewer discipline incidents** coded as 'aggressive behavior', Insight Survey categories 'Learning Environment', and 'Diversity & Inclusion' increased significantly, contributing to the Index Percentile Rank to move from **75% to 91% in one school year**.



Exceptional Children Coordinator, KIPP Charlotte (Charlotte, NC), November 2015 - February 2017 • Rebuilt special education program by fulfilling staffing needs, writing the master school schedule to reflect n students with exceptionalities, and developing a school improvement plan to bolster instructional practice and compliance mandates maintained by North Carolina Department of Public Instruction resulting in Special Education Compliance Score **increased from 66% to 100%** as indicated by North Carolina Department of Public Instruction records and audit reports; **100% of students** achieving **over 1.5 years growth in reading** and **.75 years growth in math** as demonstrated by the mid-year NWEA MAP assessment.

Dean of School Culture, Ranson IB Middle School (Charlotte, NC), July 2014 - July 2015

- Led 70+ teachers through weekly professional practice to streamline behavior hierarchy throughout school; provide differentiated support to strengthen classroom management as evidenced by student achievement data and scores school culture rubrics resulting in TNTP Insight Survey, **increase from 32% to 86%** of teachers felt they learned a new skill for immediate use and **increase from 25% to 74%** of teachers felt the demonstrations accurately modeled effecti practice through differentiated P
- Coached a team of 13 teachers to lead culture initiatives within their grade level teams; support leadership development through weekly planning sessions and feedback, modeling, and collaboration to initiate new projects to support school-wide goals resulting in a **12-point gain** on the student growth index, making Ranson I.B. Middle school the top performing Title 1 middle schools in North Carolina this year.

Exceptional Children Teacher & Principal Intern, Ranson IB Middle School (Charlotte, NC), July 2012 - July 2014

- Co-chaired Balanced Literacy PLC to design balanced literacy and blended learning curriculum for 6th and 7th grade language arts and math classes; collaborate with 7 colleagues and administration to implement across disciplines resulting in a **14-point gain on the school growth index** as measured by North Carolina end of grade assessments; 100% of students demonstrated **over 1.75 years growth in reading proficiency** as measured by t NWEA MAP assessment.
- Lead School Culture Cadre, a committee designated to create and maintain a positive behavior support system for 900+ scholars and manage professional development for 70+ staff members to support culture-buildin

Special Education Teacher, Samuel J. Green Charter School (New Orleans, LA), July 2009 - July 2012

- Implemented research-based curriculum through balanced literacy instruction and writer's workshop; authored modified writing curriculum for special education students in grades 5-8 resulting in **97% of special educati students scored proficient or higher** on the end-of-year assessment for English Language Arts, 2011; **95% special education students scored proficient or higher** on the end-of-year assessment for English Language Art 2010.

Appendix C - References

Client Name	Virginia Department of Education
Contact Name and Title	Dr. Dave Meyers, Deputy Superintendent of Public Instruction
Contact Address	P.O. Box 2120, Richmond, VA 23218
Contact Telephone Number	804-418-4759
Email Address	Dave.Myers@doe.virginia.gov
Type of work provided to the client	Seven State-Wide Initiatives Since 2019: Virginia is for Leaders Innovation Network, Bridging the Gap, Gen AI Year of Learning)
Effective contract dates for the time frame services were/are being provided to client	March, 2019 to Current.

Client Name	PDK International (Formerly US DOE & VDOE)
Contact Name and Title	CEO, Assistant Superintendent (US DOE) & State Superintendent (VDOE)
Contact Address	PO Box 13090, Arlington VA 22219
Contact Telephone Number	804-310-51531
Email Address	jlane@pdkintl.org
Type of work provided to the client	Two State-Wide Initiatives (2019 - 21): Virginia is for Learners Innovation Network
Effective contract dates for the time frame services were/are being provided to client	March, 2019 - June 2021

Client Name	REMC Association of Michigan
Contact Name and Title	Sue Schwartz, Executive Director
Contact Address	P.O.Box 607, Marquette, MI 49855
Contact Telephone Number	517-285-2151
Email Address	sueschwartz@remc.org
Type of work provided to the client	Program Design, Strategic Planning, State-Wide Program Implementations
Effective contract dates for the time frame services were/are being provided to client	March, 2013 - Current

COMPONENT 3: PRICE

[Deliverables and Pricing](#)

COMPONENT 4: OTHER

Advanced Learning Partnerships

[Advanced Learning Partnerships \(ALP\)](#) is a premier consulting firm dedicated to transforming education through customized, systems-oriented professional learning services. Operating across over 650 communities in North America, ALP partners with educational institutions to enhance teaching, learning, and leadership practices while fostering sustainable organizational change.

ALP's approach is guided by its IDEA drivers: Inspire, Design, Empower, and Amplify.

- **Inspire:** Building strong relationships to unite all learners.
- **Design:** Creating growth models focused on learner outcomes.
- **Empower:** Implementing frameworks that drive change.
- **Amplify:** Collaborating to sustain large-scale learning transformations.

Service offerings include:

Professional Learning Facilitation

ALP designs and delivers customized training sessions, professional development workshops, and coaching series that enable educators to integrate innovative practices into their teaching and leadership roles.

Executive Consulting

ALP provides strategic guidance for systems-based organizational change. Services include the development of guidelines, frameworks, policies, and strategic plans to drive sustainable improvements.

Leadership and Capacity-Building Coaching

Through coaching services for leaders, teachers, and instructional coaches, ALP helps build capacity for creating conditions that enhance organizational effectiveness.

Curriculum and Resource Development

ALP supports schools and districts in creating standards-aligned curricula, field guides, courses, and other learning resources tailored to their unique goals and learner needs.

The ALP team is composed of Organizational Psychologists, Data Scientists, and accomplished educators with extensive experience as classroom teachers, instructional and technology coaches, school principals, district leaders, curriculum directors, assistant superintendents, and superintendents. The majority of ALP team members hold Masters or Doctoral level credentials in their line of work.

By partnering with ALP, educational organizations can access a wealth of expertise and resources to drive meaningful, sustainable change while empowering educators and learners to thrive in a rapidly evolving educational landscape.

ALP's commitment to values such as honesty, transparency, courage, and collaboration ensures that their partnerships are built on trust and focused on empowering every learner to be the change their community needs.

Panorama Education

[Panorama Education](#) helps schools and districts transform their approach to education, so that every student thrives in school, every student benefits from an excellent education, and every student graduates prepared with the knowledge, skills, and mindsets they need to thrive in the modern, ever-changing world. Through their work to improve education, they help create a world where every child has equitable access to opportunities in school and in society more broadly. Panorama proudly supports over 15 million students in 25,000 schools, 2,000 districts, and 50 states.

Panorama helps education institutions move quickly from interpreting data to taking action. Strategic priorities supported by Panorama include:

- **Multi-tiered Systems of Support:** Strengthen MTSS/RTI with research based interventions and progress monitoring
- **Positive Behavior Interventions and Supports:** Identify behavior insights to create effective interventions and a positive climate
- **Student Check-ins:** Get a quick pulse on student perceptions to deliver rapid supports
- **Family Engagement:** Gather family feedback and build their capacity to contribute to student learning
- **Teacher Surveys and Well-Being:** Assess teacher wellness to help prevent burnout and turnover

YUMNA NAJAM AHMED

Vancouver, British Columbia, V5X 2M3

902.989.4074

[Linkedin](#)

yumnaahmed1@hotmail.com

PROFILE

Dedicated Industrial and Organizational Psychology MSc practitioner with a specialization in psychometrics and a profound commitment to Diversity, Equity, and Inclusion (DEI). Proven expertise in the development, validation, and analysis of psychometric assessments, combined with advanced skills in statistical analysis using R and SPSS. Passionate about leveraging evidence-based research to foster equitable assessment practices and enhance organizational effectiveness. Proficient in designing and implementing psychometric tools and student assessments, transforming complex dataset analyses into actionable strategies. Adept at managing high-stakes assessment projects, ensuring precision, security, and timely reporting of results.

SKILLS

- **Assessment Development and Delivery:** Expertise in creating, scoring, and analyzing high-quality assessment materials including workplace-based assessments.
- **Coding and Data Analysis:** Excellent coding skills in R for analyses and simulations; proficient in Python and Tableau.
- **Test Development and Security:** Background in test development with experience in Generative AI, Large Language Models, and Item Generation.
- **Data Visualization:** Proficient in transforming complex data into clear visualizations using tools like Microsoft Power BI.
- **Psychometric Analysis and Test Development:** Expert in using both Classical Test Theory (CTT) and Item Response Theory (IRT) for the creation and validation of equitable testing instruments.
- **Advanced Research Methodologies:** Proficient in quantitative and qualitative research techniques, data collection through surveys, interviews, focus groups, and observations.
- **Advanced Data Analysis:** Experienced in SPSS, Excel and R for descriptive statistical analysis, data structuring, and cleaning. Skilled in translating data findings into comprehensible reports and visualizations.
- **Technical Reporting:** Exceptional ability at distilling complex analytical findings into clear, concise, and actionable insights. Extensive experience in creating technical documents, manuals, and research papers, along with aptitude for tailoring communications for diverse audiences.
- **Project Management:** Demonstrated success in leading multifaceted projects from inception to delivery, with keen attention to aligning with strategic goals. Proficient in coordinating cross-functional teams, managing timelines, and fostering stakeholder engagement to achieve targeted outcomes.
- **Stakeholder Engagement:** Skilled in communicating complex psychometric concepts to diverse audiences, facilitating data-driven decision-making processes.
- **Compliance and Security:** Proficient in ensuring high-security, technology-enabled processes for handling sensitive assessment data. Experienced in maintaining the confidentiality and integrity of examination and assessment results.
- **Continuous Improvement:** Committed to participating in continuous improvement initiatives for program assessment and curriculum development.
- **SQL and Database Management:** Proficient in using SQL for database queries and management, gained through experience at MAKI People.
- **Survey Design and Programming:** Experienced in designing, programming, and conducting surveys, with relevant experience from thesis research, EDIA roles, and MAKI People.

EDUCATION

Master of Applied Science: Industrial/ Organizational Psychology
SAINT MARYS UNIVERSITY, Halifax, Canada

Sep 2022 – April 2024
CGPA 4.0

- Received Faculty of Graduate Studies & Research (FGSR) Fellowship

YUMNA NAJAM AHMED

- Focused on psychometrics, personnel psychology, ethics and professional practice and advanced statistical analysis, achieving a CGPA of 4.0.
- Awarded a Teaching Assistantship, demonstrating strong communication and instructional skills.
- Conducted multi-phase research on game-based assessments and interview anxiety and performance amongst individuals with and without autism.

Post Magisterial Diploma: Clinical Psychology

Sep 2015- July 2017

BAHRIA UNIVERSITY, Karachi, Pakistan

- Concentrated on psychological assessment, therapy, and test construction, including training in quantitative analysis methods, with a CGPA of 3.74.
- Developed expertise in survey design, analysis, and delivery of results, relevant for assessment development.

Bachelor of Science: Majors: Psychology

Sep 2011- May 2015

SZABIST, Karachi, Pakistan

- Developed foundational knowledge in psychological principles and research methods, graduating with a CGPA of 3.24.
- Completed projects involving statistical analysis and research methodologies, laying the groundwork for advanced psychometric analysis skills.

WORK EXPERIENCE

Psychometrician

September 2023 – April 2024

MAKI People, Vancouver British Columbia

- I led the development and validation of a wide range of psychometric assessments for global clients like Grant Thornton, PwC, H&M, and Deloitte. This initiative significantly expanded our offerings and contributed to a projected revenue showcasing the power of integrating scientific methods into product development.
- I employed a variety of advanced statistical methodologies—including Exploratory Factor Analysis (EFA), Confirmatory Factor Analysis (CFA), and Item Response Theory (IRT), and SQL via R, SPSS, and Big Data analytics—to enhance the reliability and validity of assessment tools. This approach ensured the delivery of high-quality, data-driven solutions capable of supporting diverse client needs and facilitating informed decision-making processes.
- From creating items to authoring technical manuals, I managed the entire product development cycle. This resulted in the successful launch of scalable assessments, including nonverbal reasoning tests, executive assistant tests, retail sales foundation tests, and customer orientation tests.
- I simplified complex psychometric data for various departments, making it easy for stakeholders to understand and use the findings in strategic initiatives. I also prepared comprehensive reports and scorecards for different assessments, ensuring data was presented clearly and accurately.
- I authored technical manuals and published results, elevating the company's standing in the field, and leading to potential revenue increases. This role required meticulous attention to detail, high precision in data handling, and a commitment to maintaining the confidentiality and security of sensitive data.
- I produced detailed visualizations using Microsoft Power BI, transforming quantitative data into clear and descriptive visualizations such as graphs, tables, and dashboards, meeting the requirements for producing data visualizations.

Research Analyst: Psychometrics and Data (Intern)

May 2023 – September 2023

MHS Assessments, Vancouver, British Colombia - Remote

- I leveraged R to conduct pivotal research in emotional intelligence and personality assessment, delivering insights that directly contributed to the enhancement and revenue increase of the EQI 2.0 product. My work underscored the essential role of sophisticated statistical analyses in translating complex data into strategic asset for product development and market competitiveness.

YUMNA NAJAM AHMED

- I produced and released five white papers on the impact of emotional intelligence (EI) on leadership and workplace dynamics. These papers emphasized EI's significance in organizational success and its role in leadership development. My ability to convert complex research into actionable strategies was crucial in this role. This showcases my ability to write analytic documents for a wide range of audiences.
- I performed detailed item analysis and compiled comprehensive performance reports for the EQI 2.0. This involved ensuring data integrity and reliability, which is vital for maintaining the quality of assessment tools.
- I showcased conscientiousness, responsibility, and independence in carrying out data analyses with minimal supervision, while maintaining a high degree of flexibility and adaptability to meet changing demands and timelines in a research-intensive environment.
- I utilized SPSS and R for statistical analysis, ensuring data integrity and reliability in the creation of detailed and accurate performance reports for stakeholders. This experience underlines my expertise in data integrity and reliability, key components in any assessment or methods specialist role.

Research Analyst: Interviewer

September 2023-April 2024

Nova Scotia Centre on Aging, Mount Saint Vincent University

- Led structured virtual interviews and data collection efforts focusing on work life quality within long-term care settings. By applying Computer-Assisted Personal Interviewing (CAPI) methodologies, I ensured the accuracy and reliability of data capture, which is crucial for developing robust assessments and evaluations.
 - Through this role, I gained unique insights into the mental and physical health, job satisfaction, burnout, and work engagement among LTC staff. This experience helped me develop a nuanced understanding of healthcare work environments and their impact, which is directly applicable to researching and evaluating factors that influence employee well-being and performance.

Occupational Health and Safety Outreach Coordinator

September 2022- April 2023

CN Centre, Saint Mary's University

- I significantly increased the CN Centre's visibility and impact through the development of a comprehensive website content strategy. Focused on enriching the site with engaging Occupational Health Psychology (OHP) and Occupational Health and Safety (OHS) content, thereby enhancing the center's educational outreach and online presence.
- I contributed to revising the Workers Compensation Board (WCB) NS policy by supplying critical OHS insights and actionable recommendations. My contributions underlined the importance of data-driven decision-making in policy enhancement, ensuring that governmental guidelines align with best practices in occupational health and safety.
- I collaborated on a project under Construction Safety NS, conducting in-depth research on construction-related injuries, fatalities, and accidents. This pivotal work laid the groundwork for developing and advising on evidence-based safety recommendations, similar to how one would develop and refine assessment tools and methodologies.
- I mobilized university faculty and students to organize and participate in the "Steps for Life" fundraising event, supporting families affected by workplace tragedies. This initiative showcased my exceptional teamwork and community engagement skills, essential for collaborative projects in any research setting.
- I authored and presented a comprehensive proposal for the CN Centre, effectively communicating our mission and the significance of OHP. I also crafted presentations to raise awareness about workplace fatalities across Canadian provinces, demonstrating my ability to develop and deliver clear and impactful reports and presentations.
- I collaborated with subject matter experts worldwide to organize and host seminars on pivotal OHP topics, including "Supporting Sustainable Return to Work Among Workers with Mental Health Programs," "Disability Employment Awareness Month," and "Workplace Safety Climate and Leadership." These seminars not only broadened our educational reach but also positioned CN Centre as a thought leader in these critical areas of OHP. This experience is analogous to developing training and workshops for assessment methodologies.
- Through these diverse roles and initiatives, I deepened my expertise in project coordination and occupational health psychology. I gained a practical and robust understanding of workplace health and safety challenges, skills that are directly applicable to managing and coordinating assessment and research projects.

Equity, Diversity, inclusion Applied Scientist

May 2023 – September 2023

YUMNA NAJAM AHMED

Supervisor: Dr Lucie Kokum, Saint Mary University, Halifax, Nova Scotia

- I conducted an in-depth analysis of the EDIA winter survey, evaluating students' and faculty's perspectives on inclusion, racism, discrimination, and disability. This role showcased my ability to design and analyze surveys, transforming data into actionable insights, which is directly applicable to developing and delivering effective assessments.
- Utilized R and IBM SPSS for quantitative data analysis to address EDIA challenges, translating complex data into clear, strategic recommendations for policy reform. This experience demonstrates my capability to leverage data-driven insights for evidence-based decision-making, a core requirement for any assessment role.
- Utilized lived experience and quantitative analysis to enrich research, underscoring the importance of diverse perspectives in developing inclusive and effective policies. This commitment to diversity, equity, and inclusion ensures fair and comprehensive assessment practices.
- I prepared detailed reports and presentations on survey findings, offering stakeholders clear and actionable recommendations to enhance inclusion and reduce discrimination within the university. My ability to communicate complex data effectively is crucial for creating impactful assessments and evaluations.
- I worked closely with faculty and administration to implement policy changes based on survey insights, demonstrating a proactive approach to continuous improvement in educational settings. This collaborative experience is vital for working with stakeholders in developing and refining assessment tools.

Research Assistant (Asynchronous Video interviews and Impression Management)

Sep 2022 – April 2023

Supervisor: Dr Nicolas Roulin, Saint Mary University, Halifax, Nova Scotia

- Analyzed job candidates' responses using standardized BARS, contributing to the enhancement of interview question effectiveness and fairness.
- Employed meticulous item analysis on interview video data to advance the development of the Automated Video Interviewing platform (VIPP).
- Delivered research findings to optimize VIPP's performance, impacting the quality of candidate assessments.

Graduate Teaching Assistant

Sep 2022 – April 2024

Saint Mary University, Halifax, Nova Scotia

- Facilitated course instruction and provided personalized support, significantly enhancing the academic performance of undergraduate psychology students courses include introduction to psychology, organizational psychology and research methods.
- Maintained and managed grading databases, ensuring accurate recording of coursework and examination results
- Participated in individual and group tutoring sessions to students.
- Delivered personalized educational, behavioral and emotional support to individual students to enable positive learning outcomes.

Knowledge Translation Research Assistant

Sep 2022 – April 2023

Supervisor: Dr Debra Gilin, Saint Mary University, Halifax, Nova Scotia

- I led data management and performed complex analyses using SPSS, Excel, and Jamovi, focusing on projects centered around occupational health. This included dissecting patterns and trends to inform strategic approaches to health and wellness interventions.
- Played a key role in the design and execution of seminars, webinars, workshops, and public lectures aimed at disseminating research findings across academic and professional landscapes, enhancing community engagement and knowledge exchange.
- Contributed effectively to the production of academic materials by assisting in editing, creating tables and graphs, conducting comprehensive literature searches, and ensuring manuscript readiness for scholarly journal

YUMNA NAJAM AHMED

submissions. This work was instrumental in advancing the understanding of occupational health issues and potential intervention strategies.

College Teacher: Psychology/ Sociology

Alpha College, Karachi, Pakistan

Sep 2018 – June 2022

- Facilitated learning for over 100 A-level students in sociology and psychology, demonstrating the capacity to distill complex topics into understandable content, a skill transferable to developing and delivering training within corporate settings.
- Managed classroom environments under tight deadlines and in a fast-paced setting, mirroring the ability to handle project timelines and pressures within an organizational context efficiently.

Psychological Assessment and Counselling Specialist

PNS Shifa Hospital, Karachi, Pakistan

Sep 2015 – June 2016

- I conducted thorough behavioral health assessments and facilitated up to eight individual therapy sessions weekly. This role allowed me to contribute significantly to the mental and emotional well-being of a diverse client base, including both young and adult clients.
- I developed and implemented tailored therapeutic programs to address the unique psychological needs of each client. This experience demonstrated my ability to provide personalized care and attention, ensuring that each individual's needs were met effectively.

PROJECT EXPERIENCE

Talent Assessment Project

Babcock Canada, Toronto, Ontario

Sep 2022 – Dec 2022

- Executed a comprehensive job analysis, resulting in refined job descriptions and enhanced assessment processes for the Quality Assurance Specialist role.
- Designed an evidence-based personnel selection process, incorporating structured interviews and situational judgment tests, which improved recruitment efficiency and predictive validity.
- Produced an in-depth assessment report for the client, enhancing the recruitment strategy's effectiveness.

Validation of Inclusive Organization Scale

Supervisor: Dr Arla Day, Saint Mary University, Halifax, Nova Scotia

Sep 2022 – Dec 2022

- Devised an Inclusive Leadership Scale assessing organizational inclusivity, deploying rigorous validity and reliability tests to ensure psychometric soundness.
- Aided in the preparation and delivery of stakeholder reports and presentations, facilitating the adoption of inclusivity practices. Presented the findings at Canadian Psychological Association conference in Toronto.

CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

Business Ethics: LinkedIn Learn

July 2023

Worker Health and Safety Awareness Training: Ontario Government

May 2023

Research Ethics: Government of Canada

Sep 2022

Katherine M. Fodchuk, Ph.D.

Advanced Learning Partnerships, Inc. Chapel Hill, N.C.
katy@alplearn.com

SUMMARY

Industrial/organizational psychologist with 25 years of broad experience and deep consulting expertise in areas including: educational systems, organizational leadership, workplace wellness, strategic planning design and implementation, educational program evaluation, talent development systems, psychometrics, test validation and development, EEO litigation support, and organizational change management. Research areas include educator effectiveness and retention; perceptions of organizational justice (fairness) across cultures; performance evaluation; employee selection; innovation implementation, and educator professional development.

PROFESSIONAL EXPERIENCE

Advanced Learning Partnerships, Inc. (2017-Current)

Executive Director, Organizational Development

Leads ALP's Organizational Systems team and sits on the Executive Leadership (360 Team) and Business Development Team. Leads design and implementation of ALP's organizational development consulting services including competency modeling, strategic planning, program impact, workplace wellness, action-based talent development, and organizational leadership consulting. Leads the development and implementation of employee recruitment and selection processes, employee talent development system, and alignment with strategic priorities. Supports ALP team to ensure service delivery quality through design and implementation of ALP's partner feedback metrics, data analytic tools, and dashboards. Builds data collection, reporting and analysis tools for district partners including coaching tools for educators, program evaluation, surveys, metrics design, reporting and data dashboards.

Director, Research and Organizational Development (2011-2017)

Description: Leads research to document ALP professional learning services' impact in school districts; development and validation of online coaching/educator evaluation tools, dashboard, and reporting systems surrounding innovation, technology integration, action research and creativity; funding procurement: RFP and grant development; development of internal structure, evaluation, and processes surrounding coaching and professional learning services and ALP employee performance and talent management system.

VIF, International Education (Now Participate Learning) (2008-2011)

Director of Teacher Quality and Director of Program Research and Evaluation

Description: Development, validation, and implementation of a global selection process for international educators hailing from 30+ countries for the largest U.S.-based educator exchange program; development and integration of teacher workforce data and survey feedback into strategic selection, professional development, training and expatriate support systems and processes; directed highly performing teams across Teacher Selection/Admissions and Support departments (head of Teacher Quality division), lead development and evaluation of language and cultural awareness programs.

Contract Consulting (2004-2008)

Clients/Partners: Paris Phoenix Group, Limeade, Microsoft, T.S. Designs, VIF International Education

Projects: Validation of workplace well-being measure; research-based recommendations and change model for a large software company surrounding the merger and acquisition process when the goal is talent retention; criterion

validation of leadership and executive team leadership measures for consulting firm; organizational diagnosis, intervention, and evaluation plan for manufacturing company that was shifting to a sustainable business model.

California State Personnel Board (2002-2004)

Test Validation and Development Consultant

Description: Management of numerous projects involving large scale data collection, occupational and job analysis, competency modeling, and selection system development for positions in various California state agencies. Lead and facilitate complex projects and work of key stakeholders (e.g., executive officers, commissioners, board members, managers, subject matter experts, etc.) to develop and implement new selection systems, training objectives, and performance standards. Lead inter-agency training seminars for state selection analysts' certification program on principles of test validation, job analysis, and statistics in personnel selection.

Biddle Consulting Group, Inc. (1998 – 2001)

Position: Consultant

Description: Project management in litigation support in the areas of selection system validation, alternate employment practices, disparate impact analysis, EEO case law research, reduction-in-force analysis, declaration/legal document writing; management of large-scale compensation audit review; development of statistical analysis software for examination of equity in employee compensation.

ACADEMIC POSITIONS

Old Dominion University, Norfolk, VA

Darden School of Education, Programs for Research and Evaluation in Public Schools (2006-2008)
Graduate Research Assistant: Implementation of instructional change intervention involving professional development for educators; use of process consultation for needs identification; learning teams; development of integrated and formative evaluation of intervention; grant writing.

Graduate Teaching Assistant: GEN 101 - Global Environment (2004-2005)

Psychology Department

Adjunct Lecturer: Psychology 345 - Organizational Psychology (Fall 2005)

INSITE Research Assistant: NSF Grant –“Creating an Inclusive Learning Environment: Enhancing Retention of Women and Minorities in Computer Science” (2004-2005)

California State University, Sacramento

Instructor: Psychology 1-Basic Processes (Spring 2001)

EDUCATION

Old Dominion University, Norfolk, VA

Ph.D., Psychology (December 2008)

Minor: International Studies

California State University, Sacramento

Master of Arts in Industrial/Organizational Psychology (January 2003)

Fulbright Scholar to France (Université de Nice, Sophia Antipolis, 2001-2002)

California Polytechnic State University, San Luis Obispo

Bachelor of Science in Psychology (March 1998)

Minor: French

PUBLICATIONS

- Fodchuk, K. M., & Hu, X. (2024). Understanding the full journey from burnout to wellness: How and why we must address educator burnout at a systems level. *Wellness Education Magazine: Headwater Foundation*. 1(2).
- Ren, H., Yunlu, D. G., Shaffer, M., & Fodchuk, K. M. (2021). Thriving and retention of expatriates: Cultural intelligence and organizational embeddedness inputs. *International Journal of Cross-Cultural Management*, 21(2).
- Yunlu, D.G., Ren, H., Mohler Fodchuk, K. and Shaffer, M. (2018), "Home away from home: community embeddedness and expatriate retention cognitions", *Journal of Global Mobility*, Vol. 6 No. 2, pp. 194-208. <https://doi.org/10.1108/JGM-10-2017-0045>
- Ren, H., Yunlu, D. G., Shaffer, M., & Fodchuk, K. M. (2015). Expatriate success and thriving: The influence of job deprivation and emotional stability. *Journal of World Business*, 50(1), 69–78.
- Ren, H., Shaffer, M. A., Harrison, D. A., Fu, C., & Fodchuk, K. M. (2014). Reactive Adjustment or Proactive Embedding? Multi-Study, Multi-Wave Evidence for Dual Pathways to Expatriate Retention. *Personnel Psychology*, 67, 203 – 239.
- Fodchuk, K. M., & Sherman, H. D. (2008). Procedural justice and French and American performance evaluations. *Cross Cultural Management: An International Journal*, 15, 285-299.
- Fodchuk, K. M. (2007). Work environments that negate counterproductive behaviors and foster organizational citizenship: Research-based recommendations for managers. *The Psychologist-Manager Journal*, 10, 27–46.
- Davis, D. D., Major, D. A., Sanchez-Hucles, J. V., DeLoatch, S. J., Selgrade, K. A., Meert, S. K., Jackson, N., Downey, H. J., & Fodchuk, K. M. (2006). Enhancing inclusion in computer science education. In E. M. Trauth (Ed.), *Encyclopedia of gender and information technology* (pp. 269-274). Hershey, PA: Idea Group Reference.
- Fodchuk, K. M. & Sidebotham, E. J. (2005). Procedural justice in the selection process: A review of research and suggestions for practical applications. *The Psychologist-Manager Journal*, 8, 105 - 120.
- Stillson, C. S. & Mohler, K. M. (2001). History still in the making: the continual struggle for equal pay. *World at Work Journal*, 10(1), 28 – 37.

CONFERENCE PAPERS/PRESENTATIONS

- Fodchuk, K. F. & Shareski, D. (2023). Educator Overwhelm: Factors Influencing Burnout in School and Turning the Tide Toward Wellness. Presented at the ULead Conference (Alberta Teachers Association and Council on School Leadership) in Banff, Alberta, Canada.
- Fodchuk, K.F. (2023). Leadership Strategies for Addressing Educator Burnout. Ontario Educators’ Professional Learning Series (OECM). Virtual Venue.
- Fodchuk, K.F. (2022). Take Your Day Back: Leveraging Planning Technologies to Optimize Meetings. *Presented at the InTech Conference - Cobb County School District, Marietta, GA.*
- Fodchuk, K.F. (2022). Reducing Burnout in Your School or District: Practical Strategies for Education Leaders. *Presented at the InTech Conference - Cobb County School District, Marietta, GA.*

- Fodchuk, K.F. (2021). From Burnout to Thriving: Emerging Stronger Together. InTech Conference - Cobb County School District, Virtual Venue.
- Fodchuk, K.F. Kennedy, C., Lyman, G. & Stanfill, M. (2020). Designing Learning for Professional Growth. Learning Forward Conference (Virtual Venue).
- McMurray, C., Fodchuk, A., Lyman, G. & Fodchuk, K.F. (2017). Nurturing Organizational Growth in a Personalized Learning Model. Learning Forward Conference, Orlando, FL.
- Simms, L., Fodchuk, K.F. Patin, M. & Lyman, G. (2017). Capturing Professional Growth in the Coaching Cycle. Learning Forward Conference, Orlando, FL.
- Ren, H., Yunlu, D. G., & Fodchuk, K. (2014). Home away from home: The role of community in expatriate work engagement. *Presented at the Society for Industrial/Organizational Psychology Annual Conference in Honolulu, HI.*
- Ren, H., Yunlu, D. G., & Fodchuk, K. (2012). Engagement of self-initiated expatriates: Personality and information seeking. *Presented at the Society for Industrial/Organizational Psychology Conference in San Diego, CA.*
- Ren, H., Yunlu, D. G., Fodchuk, K., & Shaffer, M. (2011). Cultural Intelligence, role clarity, and thriving: Implications for self-initiated expatriate experiences. *Academy of Management Annual Meeting, San Antonio, TX.*
- Ren, H., Fodchuk, K.M., & Miller, G.J. (2010). A proactive perspective on expatriate retention. *Academy of Management Annual Meeting Symposium, "More than Once in a Lifetime: Individuals' Transitions across Role, Career, Cultural and Geographical Boundaries," Montreal, Quebec, Canada.*
- Fodchuk, K. M., & Myran, S. (2009). Comparing participation, commitment, and support for change in two formative assessment professional development settings. *American Educational Research Association Annual Conference in Chicago, Ill.*
- Myran, S., Burke, M., Fodchuk, K., & Baker, P. (2009). From Alex's school to Harriet's: Lessons from one assessment for learning partnership to another. *American Educational Research Association Annual Conference in Chicago, Ill.*
- Fodchuk, K. M. & Liu, Y. (2008). Chinese organizational justice judgments: Developing adaptable measures for use in both emic and etic contexts. *Academy of Management Annual Meeting symposium, "Approaches to Validating Measures for the Chinese: Aligning Strategy and Purpose,"* (Fodchuk was symposium coordinator).
- Fodchuk, K. M., Myran, S., & Robinson, J. (2008). Momentum for change: Examining the relationships among teacher participation level, commitment to change, and behavioral support for change. *American Educational Research Association Annual Conference in New York City, NY.*
- Fodchuk, K. M., Liu, Y., & Qiu, J. (2007). Organizational Justice in China: Results from a Qualitative Analysis. *Paper presented at the American Psychological Association Conference in San Francisco, CA.*
- Fodchuk, K. M., & Downey, H. J. (2007). Instrumental and Noninstrumental Voice and Procedural Justice in French and American Performance Evaluations. *Presented in the International Organizational Behavior symposium at the Academy of Management Conference in Philadelphia, PA.*
- Fodchuk, K. M., Yan, G., Zhang, Z., Liu, Y., Wei, R., & Li, X. (2006). Culture-Specific Criteria in Chinese Organizational Justice Judgments. *Paper presented at the "Business as an Agent of World Benefit: Management Knowledge Leading Positive Change." Conference hosted by the Academy of Management and the United Nations at Case Western Reserve University in Cleveland, Ohio (October 23 – 25, 2006).*
- Fodchuk, K.M., Davis, D. D., Downey, H. (2006). Group-Level Analysis of Innovation Implementation Effectiveness. *Paper presentation for the Society of Industrial/Organizational Psychology Conference in Dallas, Texas in May 2006.*

Fodchuk, K.M. (2004). *Promoting Fairness in Assessment and Other Employment Practices*. Presented at the Personnel Testing Council of Northern California Annual Spring Conference. Emeryville, CA.

Mohler, K.M. (2000). *How to Address Both OFCCP and Title VII Burdens in Pay Equity Analyses*. Presentation at American Association for Affirmative Action 26th Annual Conference, Washington D.C.

GRANTS, AWARDS, SERVICE

Mathkind, Board Member (2024-Current).

Advisory Board Secretary, Healing Pines Respite (2019-Current).

Nominated and selected to participate in the Academy of Management Annual Meeting's Organizational Development and Change Doctoral Student Consortium (Philadelphia, 2008).

First alternate for the **National Science Foundation's** East Asian Pacific Summer Institute. Funding for dissertation research conducted in China (Summer 2006) awarded by Old Dominion University's College of Sciences and Dragus International Center.

Fulbright Advanced Student Scholarship (2001-2002): Université de Nice, Sophia-Antipolis (Dirk Steiner, Host Professor). Research was conducted for master's thesis at CSUS and included a cross-cultural investigation of structure and procedural justice perceptions of performance appraisals in French and American organizations.

Preparing Future Faculty Steering Committee, Old Dominion University 2006-2008

Reviewer *Organization and Group Management Journal* (2007)

Personnel Testing Council of Northern California (Secretary 2003-2004)

Certified Selection Analyst – California State Personnel Board (2003)

Certified Mediator – Conflict Resolution Program of the Central Coast (1998)

AFFILIATIONS

Society for Industrial/Organizational Psychology

American Psychological Association

Academy of Management

American Educational Research Association

ASCD (Association for Supervision and Curriculum Development)

Fulbright Alumni Association

Fulbright North Carolina Regional Chapter

Personnel Testing Council of Northern California



Kylie E. Hand

KylieElizabethHand@gmail.com | 724. 777. 2134

Professional Portfolio: linktr.ee/kyliehand

With a background in professional leadership, public management, & civic engagement, my journey from the classroom to consulting underscores my commitment to advancing high-quality, innovative learning across diverse audiences. I now seek to contribute my influence & skillset, including my business analytics & learning design mindset, for expanded impact within the industry.

EDUCATION

- Drexel University, Philadelphia, PA** **2018 – 2019**
Educational Leadership & PA School Principal Certification (K-12)
- Carnegie Mellon University, Pittsburgh, PA** **2013 – 2016**
Master of Public Management from H. John Heinz III College
Graduated with Highest Distinction Honors
- Duquesne University, Pittsburgh, PA** **2007 – 2011**
B.S., Elementary Education (K-6) / Early Childhood Education (N-3)
Instructional Technology Specialist Certification (K-12)

LEADERSHIP & SUPERVISORY EXPERIENCE

- Chester County Intermediate Unit (CCIU), Downingtown, PA** **2020 – Present**
Director of Learning Design & EdTech / Director of STEM & Online Learning
Coordinator of Online Learning
A PreK-12 educational service agency administrator, propelling change in school districts across PA through collaborative, high-quality, innovative professional learning, leadership, & partnership for district stakeholders.
- **Leadership:** entrepreneurial revenue-generating services, data analysis, budgets & grants, vendor partnerships, project management, key leader/member of statewide committees
 - **Human Resources:** recruit, hire, onboard, coach, mentor, supervise, foster a collaborative & high-achieving work culture of continuous improvement & innovation
 - **Professional Learning Concentrations:** online & blended learning, personalized & competency-based education, STEM, artificial intelligence (AI), edtech integration, gifted, data science, spatial design, maker education, certification & endorsement programs
 - **Professional Learning Delivery:** customized, proposal-based, short/long-term, online/in-person, cohorts, events, coaching, courses, workshops, conferences, & networks
- Brentwood Borough School District, Pittsburgh, PA** **2016 – 2017**
Coordinator of Instructional Technology & Innovation
K-12 District Administrator providing leadership for infrastructure & instructional technology integration, STEM, blended learning, spatial design, maker education, & strategic partnerships for district stakeholders.
- **Leadership:** budgets & grants, community partnerships, oversight of school district technology budget, creation of new policies & procedures for hardware / software usage & electronic communications, professional development, IT management, strategic planning

CLASSROOM INSTRUCTIONAL EXPERIENCE

Managed the instruction of heterogeneous classrooms through hands-on approaches while serving as the lead-teacher & annually earning a "Distinguished" rating by administrators.

Kutztown Area School District, Kutztown, PA

2017 – 2020

Teacher – Grade 1

- **Classroom Teacher Leadership:** District Literacy (Co-chair), Elementary Equity (Co-chair), Building Public Relations (Co-chair), After-School Literacy Tutoring (Co-coordinator), Member of Superintendent's Teacher Leadership Institute, Special Education Planning, District Comprehensive Plan, Building-level Instructional Leadership Team

Chartiers Valley School District, Pittsburgh, PA

2012 – 2016

Teacher – Grade 2

- **Classroom Teacher Leadership:** Building-level Instructional Leadership Team, Math Curriculum, Emotional Support, & Parent Engagement

Quaker Valley School District, Sewickley, PA

2011 – 2012

Teacher – Grade 3, Long Term Substitute

- **Classroom Teacher Leadership:** Assembly Coordinator & ASSET Science Online Leader

PERFORMANCE ACHIEVEMENTS

Demonstrations of positive impact on schools through commitment, collaboration, & excellence.

- Leader of successful application for CCIU to be selected as the fiscal agent for the \$3.5 million federal JAVITS grant: PA Gifted Equity Initiative
- Strategically led Divisional goal, resulting in a 78% increase in enrollment of Center for Advanced Professional Studies (CAPS) programming over 2 years
- Conducted a meticulous financial analysis & implemented strategic pricing initiatives, achieving an ongoing annual revenue increase of at least \$30,000 for CAPS programming
- Collaboratively developed comprehensive professional learning initiatives & partnerships with at least 45 school districts, ensuring the highest standards of instructional quality
- Oversaw multiyear instructional design for the UPenn Chester County Consortium for Mental Health & Optimal Development, showcasing a commitment to high-quality performance
- Co-hosted the influential PA Regional Instructional Tech Collaborative, fostering collaboration & knowledge exchange with individuals from across at least six counties
- Conducted rigorous instructional tech audits for school districts
- Established District's first technology strategic plan at Brentwood Borough School District

NOTABLE CONTRIBUTIONS

Illustrations of local, state, & national invitations to contribute professional leadership.

- Selected to lead the PA Department of Education statewide Student-Centered Learning Network with a May 2024 Kickoff that had 170+ attendees representing all regions within state
- Selected to co-present on artificial intelligence (AI) at PA Department of Education SAS Institute with Special Consultant to the Secretary of Education for STEM & Computer Science
- Commissioned by the PA Department of Education to craft a groundbreaking statewide AI course, freely accessible on the PA SAS Portal for all educators in PA
- Coauthored impactful narratives for a statewide publication on Student-Centered Learning, contributing to thought leadership in the education sector
- Co-planner of the 2024 AI Summit at PETE&C (PA EdTech Expo & Conference)
- Selected to be a project mentor in the CCIU Leadership Development Program for 2 years
- Selected as 1 of 10 innovative classrooms in Pittsburgh for DiscoverED Remake Learning Days

SELECTED HONORS & AWARDS

- Educator Fellow – Center for Integrative Research in Computing & Learning Sciences (2023)
- Parent-Teacher “It Takes a Team” Design Challenge Grant Award – IDEO San Francisco (2019)
- Catalyst Grant Award – Kutztown Area School District (2018)
- Mind, Heart, & Spirit Alumni Award – Duquesne University (2017)
- Western PA Rising Star Award – Get Involved Pittsburgh (2017)
- “Promising Practices Educator” – Character.org's first-ever individual winner (2015)
- Dean’s Teaching Fellow – Duquesne University (2011)
- Faculty Excellence Award: Early Childhood Education – Duquesne University (2011)
- National Education Scholarship – Delta Kappa Gamma (2011)

CIVIC & COMMUNITY LEADERSHIP

- **Board Member**, Pennsylvania Governor's School for the Sciences
Pennsylvania (July 2022 - Present)
- **Advisory Board Member**, K-12 Innovation, Consortium for School Networking (CoSN)
Remote (August 2023 - Present)
- **Volunteer Ambassador**, Mark Cuban Foundation Artificial Intelligence Bootcamp
Philadelphia, PA (June 2023 - Present)
- **Judge**, Milken-Penn GSE Education Business Plan Competition, University of Pennsylvania
Graduate School of Education,
Philadelphia, PA (April 2023 - Present)
- **Co-lead**, AI Summit at PETE&C (PA Education Technology Expo & Conference)
Hershey, PA (2023 - 2024)
- **Finance Committee Member**, West Reading Borough Council
West Reading, PA (2019 – 2020)
- **Planning Committee Member**, Three Rivers Education Technology Conference (TRETC)
Pittsburgh, PA (2018)
- **Board of Directors, Executive Team**, Pittsburgh Urban Management Project (PUMP)
Pittsburgh, PA (2014 – 2017)
- **Host Committee Member**, CubaOne: Bridges to Pittsburgh Fundraiser
Pittsburgh, PA (December 12, 2016)
- **Co-Chair**, Pittsburgh Urban Magnet Project (PUMP) 20th Anniversary Celebration
Pittsburgh, PA (September 2016)
- **Coordinator of Robotics & Policy with City Councilman Dan Gilman** for Carnegie Mellon
University undergraduate robotics researchers
Pittsburgh, PA (July 2016)
- **Committee Member**, Navigating Pittsburgh Summit. Senator John Heinz History Center
Pittsburgh, PA (July 2016)
- **Co-leader**, Connecting Educators Vocational Study Group, North Way Christian Community
Pittsburgh, PA (Monthly 2013 - 2015)
- **Strategic Reviewer**, Carnegie Mellon University Robotics Institute
Pittsburgh, PA (Monthly 2013 - 2015)

Education

Clemson University (Expected: May 2025)
Ph.D. in Learning Sciences

University of South Florida (2022)
M.A. in Industrial Organizational Psychology

Grand Valley State University (2019)
B.S. in Psychology. Minor: Applied Statistics

Relevant Experience

Doctoral Research Fellow | Walter Reed Army Institute of Research | September 2023 – Present

- Led teams of 4-10 research fellows to develop 250 qualitative codes and manually code transcripts from tri-service focus groups to understand key operational and use requirements for objective behavioral health assessment tools
- Developed classification algorithm using exploratory NLP techniques to automatically code focus group utterances into 200 content codes across 19 transcripts, saving over 300 hours of employee time and increasing accuracy by 32%
- Led analysis and co-authored report to senior DHA leadership that provided recommendations for implementing objective behavioral health tools across deployed and garrison settings, and different military populations
- Worked with external funding partners to understand key project goals, deliverables, and timelines
- Utilized IRT and CFA models to assess the quality of the PCL-5 and shortform measures, providing recommendations on classification accuracy and item quality for composite scales and single items
- Developed staff trainings, wrote SOP's, and mentored junior fellows in data cleaning, R, Excel, and qualitative coding

Doctoral Researcher | Clemson University and University of South Florida | August 2019 – Present

- Used supervised machine learning algorithms to assess careless response rates across a longitudinal experience sampling study, classifying 45% of response episodes as careless and finding that personality and time features predict carelessness
- Led a team of 6 graduate students in developing a mentorship program of 40 mentors and 100 undergraduate mentees across two years: supervising material creation, program assessment, completion tracking, and program improvement
- Worked with a team of 4 graduate students to conduct a training needs assessment of the USF orientation leader training program by conducting interviews with 25 program staff to identify gaps in current training, and unmet training needs
- Participated in the Proctor and Gamble Organizational Business challenge and led a team of 4 graduate students to develop and present a proposal for a new assessment system to senior HR leadership
- Led end-to-end development of a cross-institutional survey study to examine whether dark personality traits predict job interests and values, managing all aspects from participant recruitment to data management and analysis

Data Science Intern | Slack | May 2023 – August 2023

- Developed end-to-end ML pipeline to identify the top predictors for adoption and retention of the workflow builder feature across 25+ million users, finding team 'influencers' account for 37% of the variance in workflow use
- Used exploratory NLP techniques to uncover 2 user personas and developed classification algorithms based on job title information, which classified ~80% of users as belonging to one of these personas
- Used NLP techniques to identify the top use-cases for workflows among personas and developed NLP algorithms to identify text posts expressing need for these workflows, with targeted interventions projected to increase usage by 162%
- Worked with cross-functional stakeholders and researchers in product, UX, and survey science to further org-wide persona knowledge and consolidate research into a single truth-source for these personas

Business Analyst Intern | Chegg, Inc. | May 2022 – August 2022

- Built conversion funnel dashboards to track the user journey from first touch to purchase for 10+ million users
- Worked with senior analysts to develop metrics for acquisitions and user retention using supervised machine learning
- Created and presented weekly reports on user behavior, purchasing KPIs, and root cause of changes across 5 products and 4 regions to cross-functional stakeholders in marketing, business, SEO, and finance
- Assisted the finance team in creating quarterly projections for growth, revenue, and ad spend across regions and products
- Created automated ETL jobs for weekly report data pulls using DataBricks that reduced weekly workload by 56%
- Supported 5 teams across the finance, marketing, SEO, and business departments with 25+ requests for data pulls, analysis, visualizations, and interpretation/causal inference using Excel, Amplitude, and R

Relevant Skills

• Experimental and Non-Experimental Hypothesis Testing • Causal Reasoning • A/B Testing • Survey Design and Research
• Data Visualization • Data Storytelling • Mixed Methods Research • Focus Groups, Structured and Semi-Structured Interviews

Analysis Skills

• Linear and Non-linear Regression • Logistic Regression • Decision Trees • SVM • K-Means Clustering • Multilevel, Mixture, and Time Series Modeling • Generalized Additive Modeling • NLP • tfidf • Sentiment Analysis • Topic Modeling

Programming and Technology Skills

• Python • R • PostgreSQL, MySQL • Jupyter Notebooks • Spark • Databricks • Amazon Redshift • Tableau • GitHub • Amplitude • Google Analytics and AdWords • Qualtrics • Confluence • Jira • Microsoft Word • Excel • PowerPoint • Power BI

Publications and Projects in Writing

- Wolf, M. G., & **Denison, A. J.** (2023). Survey Uses May Influence Survey Responses. *Assessment*. doi: 10.1177/10731911231213849
- Denison, A. J.**, & Wiernik, B. M. (2022). Careless Response Processes are Heterogeneous: Comment on Goldammer et al. (2020). *Meta Psychology*. doi: 10.15626/MP.2020.2637
- Wiernik, B. M., Raghavan, M., Allan, T., & **Denison, A. J.** (2022) Generalizability Challenges in Applied Psychological and Organizational Research and Practice. *Brain and Behavior Science* doi: 10.1017/S0140525X21000492. PMID: 35139963.
- Denison, A. J.**, (2022). Prevalence and Predictors of Careless Responding in Experience Sampling Research. *USF Tampa Graduate Theses and Dissertations*. <https://digitalcommons.usf.edu/etd/9341>
- Wolfe, B. M., Williams, J. T., **Denison, A. J.**, & Hart, W. L. (Under review). Verification of Past Beliefs Moderates Belief Change.
- Curran, P. G., & **Denison, A. J.** (In submission). Creating Carelessness: A Comparative Analysis of Common Techniques for the Simulation of Careless Responder Data. Pre-print available at <https://psyarxiv.com/ge6fa/>

Selected Talks and Presentations

- Denison, A. J.***, Recker, R. S., Fleischman, B. A., Wade, J., Guy, J. S., & Reddy, M. K. (August 2024). *Expected and Perceived Usability of a Wearable Device that Monitors Physiological Metrics*. Poster to be presented at 2024 Military Health System Research Symposium, Kissimmee, FL.
- Denison, A. J.***, & Curran, P. G. (April 2023). Symposium: *Recent Advances in Insufficient Effort Responding Research*. Talk presented at 2023 Society for Industrial Organizational Psychology Annual Conference, Boston, MA.
- Denison, A. J.***, & Curran, P. G. (April 2022). Symposium: *Recent Advances in Insufficient Effort Responding Research*. Talk presented at 2022 Society for Industrial Organizational Psychology Annual Conference, Seattle, WA.
- Denison, A. J.*** (November 2020). *Introduction to Industrial Organizational Psychology and Graduate School*. Talk presented at Grand Valley State University Psi Chi, Allendale, MI.
- Denison, A. J.*** (October 2020). *Careless Responding: Reasons and Remedies*. Talk presented at University of South Florida Brown Bag, Tampa, FL.
- Denison, A. J.**, Williams, T. J.*, Monaghanm C., & Wolfe, M. B. (February 2020). *Machiavellianism Predicts Careless Responding if Incentive is Present*. Poster presented at the 21st Annual Society for Personality and Social Psychology Research Conference, New Orleans, LA.
- Denison, A. J.***, Wolfe, M. B., Williams, T. J., Ciagala, K., & Evans, T. (February 2019). *Awareness of Belief Change Predicts Novel Information Seeking*. Poster presented at the 20th Annual Society for Personality and Social Psychology Research Conference, Portland, OR.

* Denotes presenters

Appendix A – Proposal Cover Sheet

Company/Name: Advanced Learning Partnerships, Inc.

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Amos Fodchuk, President
Mailing Address	PO Box 17254
City, State, Zip	Chapel Hill, NC 27516
Telephone:	919-308-2636
E-Mail Address:	amos@alplearn.com

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	Katy Fodchuk, Executive Director of Organizational Development
Telephone Number	919-428-5636
Email Address	katy@alplearn.com
Physical Address	Same
City, State, Zip	Same
Mailing Address	Same
City, State, Zip	Same

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? VND213474101
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: February 4, 2025

Appendix C - References

Client Name	Virginia Department of Education
Contact Name and Title	Dr. Dave Meyers, Deputy Superintendent of Public Instruction
Contact Address	P.O. Box 2120, Richmond, VA 23218
Contact Telephone Number	804-418-4759
Email Address	Dave.Myers@doe.virginia.gov
Type of work provided to the client	Seven State-Wide Initiatives Since 2019: Virginia is for Leaders Innovation Network, Bridging the Gap, Gen AI Year of Learning)
Effective contract dates for the time frame services were/are being provided to client	March, 2019 to Current.

Client Name	PDK International (Formerly US DOE & VDOE)
Contact Name and Title	CEO, Assistant Superintendent (US DOE) & State Superintendent (VDOE)
Contact Address	PO Box 13090, Arlington VA 22219
Contact Telephone Number	804-310-51531
Email Address	jlane@pdkintl.org
Type of work provided to the client	Two State-Wide Initiatives (2019 - 21): Virginia is for Learners Innovation Network
Effective contract dates for the time frame services were/are being provided to client	March, 2019 - June 2021

Client Name	REMC Association of Michigan
Contact Name and Title	Sue Schwartz, Executive Director
Contact Address	P.O.Box 607, Marquette, MI 49855
Contact Telephone Number	517-285-2151
Email Address	sueschwartz@remc.org
Type of work provided to the client	Program Design, Strategic Planning, State-Wide Program Implementations
Effective contract dates for the time frame services were/are being provided to client	March, 2013 - Current

Appendix D - REFERENCE SCORE SHEET

Applicant Name:
Reference Name:
Person Contacted, Title/Position:
Date/Time Contacted:
Service From/To Dates:

Able to provide services when you called?	Yes	No
Satisfied with the services provided? If no, please explain.	Yes	No
Applicant easy to work with in scheduling services?	Yes	No
Was the service completed on time and within budget?	Yes	No
Applicant listened when issues were presented to resolve conflict? (If never had an issue, please check here ____.)	Yes	No
Would you hire them again?	Yes	No
Would you recommend them?	Yes	No

Potential applicant must have a minimum of 6 “yes” answers on the questions above from two references (total of 12 “yes” answers) to be considered responsible and to be considered.

Score: Pass/Fail

Do you have any business, professional or personal interest with the applicant? If yes, please explain.	Yes	No
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A “yes” to the above question may result in an automatic disqualification of the provided reference; therefore, resulting in a score of zero as responses to previous questions become null and void.

Notes:

Program Director: _____
Signature
Title
Date

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](#) under “Public Notice” Request for Applications, Qualifications, and Proposals section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: *If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.*

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor's bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The Offeror represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's bid or proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

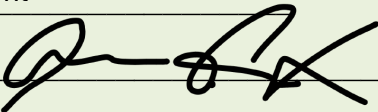
COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Amos Fodchuk

Title: President

Signature:  _____ Date: February 4, 2025

Modifications or additions to any portion of this document may cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

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Appendix I – COST DATA/BUDGET

The vendor should refer to [Section 2.3 Deliverables](#) and provide line-item cost detail for all deliverables identified.

Attach Excel spreadsheet if necessary.

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Appendix A – Proposal Cover Sheet

Company/Name: AnLar, LLC

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Ken Wagner, Chief Operating Officer
Mailing Address	4040 N Fairfax Dr, Suite 525
City, State, Zip	Arlington, VA 22203
Telephone:	855-962-6527
E-Mail Address:	kmkwagner@anlar.com; contracts@anlar.com


Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	Sarah Whitman, Senior Technical Assistance Specialist
Telephone Number	855-962-6527
Email Address	swhitman@anlar.com
Physical Address	4040 N Fairfax Dr, Suite 525
City, State, Zip	Arlington, VA 22203
Mailing Address	4040 N Fairfax Dr, Suite 525
City, State, Zip	Arlington, VA 22203

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? 3102134571
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: 1/30/2025

Component 1 - Plan of Action

Tab 1 - Production/Detailed Service Plan

Introduction

About AnLar

Founded in 2013, AnLar has decades of experience supporting statewide initiatives and driving large-scale system change activities, including developing comprehensive statewide strategic plans. Nationally, AnLar has partnered with over 20 states and numerous school districts to facilitate strategic planning efforts across various topics, including leadership development, early childhood, community partnerships, special education, and system improvement. AnLar offers the Mississippi Department of Education and the State Board of Education (SBE) a strong team with relevant experience and expertise to develop a comprehensive strategic plan that aligns with the Department's mission and addresses current and future challenges.

AnLar's work is organized across five key service areas, each designed to enhance and align with comprehensive strategic planning efforts:

- **Technical Assistance:** We deliver individualized technical assistance (TA) support to help organizations analyze current structures, refine internal processes, and develop actionable plans. This ensures more coordinated and efficient systems that support strategic planning initiatives.
- **Data Systems and Support:** Our content experts and technical development team members create dynamic, user-friendly data tools and systems that empower decision-making, enhance performance, and amplify strategic impact.
- **Research and Evaluation:** Our researchers provide insights that guide strategic priorities, measure success, and inform evidence-based planning.
- **Communication and Design:** Our communication and design experts ensure that strategic plans and accompanying work products are clear and engaging, resonate with diverse stakeholders, foster strong connections, and support shared understanding.
- **Government Process Improvement:** Our team has significant first-hand government experience developing and managing projects, grants, and policy initiatives designed to maximize outcomes and impact while respecting the importance and challenges of delivering government services.

Each service area complements and reinforces strategic planning, empowering organizations to achieve meaningful and sustainable results. AnLar's approach to strategic planning is rooted in capacity-building, collaboration, stakeholder engagement, and continuous improvement. We employ a framework that integrates systems thinking, research-based relationship-focused practices, and

implementation science to support effective and sustainable change. Our work is characterized by collaborative, responsive, and adaptive methodologies that prioritize the needs and goals of our clients and the stakeholders engaged in the strategic planning process.

AnLar ensures the utmost quality and consistency in project execution and management by taking on a limited number of projects using dedicated project teams with the content and technical expertise needed. Our proposed team for this project leverages the combined experiences of AnLar's staff in conducting strategic planning activities across a variety of contexts, examples of which are included in the [Past Performance](#) section. We are confident that our proposed team and approach will help the state establish a clear roadmap that aligns with the mission, goals, and evolving priorities of the citizens of Mississippi.

Required Business Information

AnLar has been operating for 12 years. Over the past five years, AnLar has employed an average of 56 employees. AnLar proposes an experienced and capable project team to support MDE and SBE in the SBE Strategic Plan and Performance Scorecard. Details of their abilities, qualifications, and experience, and references who can speak to AnLar's high-quality services, are included in [Component 2](#).

AnLar has been led by founder and CEO Tate Gould since its inception. Other executive-level employees are Chief Operating Officer Ken Wagner and Chief Financial Officer Nicole Miller. AnLar is fully owned by AnLar Group, LLC.

AnLar is not debarred and agrees that all services directly related to this contract will be provided in the United States. Our headquarters are located in Arlington, VA.

AnLar agrees if awarded the contract to secure a performance bond for 100% of the awarded contract amount and provide the original bond to the program office within 10 days of contract execution and prior to the commencement of services.



Michael Watson
SECRETARY OF STATE

Office of the Secretary of State
Jackson, Mississippi

Certificate of Good Standing

I, MICHAEL WATSON, Secretary of State of the State of Mississippi, and as such, the legal custodian of the records as required by The Mississippi Registration of Foreign Limited Liabilities Company Act to be filed in my office do hereby certify:

ANLAR, LLC

Registered the 30th day of January, 2025

A Virginia LIMITED LIABILITY COMPANY has filed the necessary documents in this office and has obtained a certificate of registration to do business in this state, under the provisions of The Mississippi Registration of Foreign Limited Liability Companies Act as shown by the records in this office.

I further certify that said Limited Liability Company has filed in this office an appointment of registration for service of process, with written acceptance endorsed thereon, and/or power of attorney, designating its agent and/or attorney for service of process in this State as:

REGISTERED AGENTS INC
270 TRACE COLONY PARK STE B
RIDGELAND, MS 39157

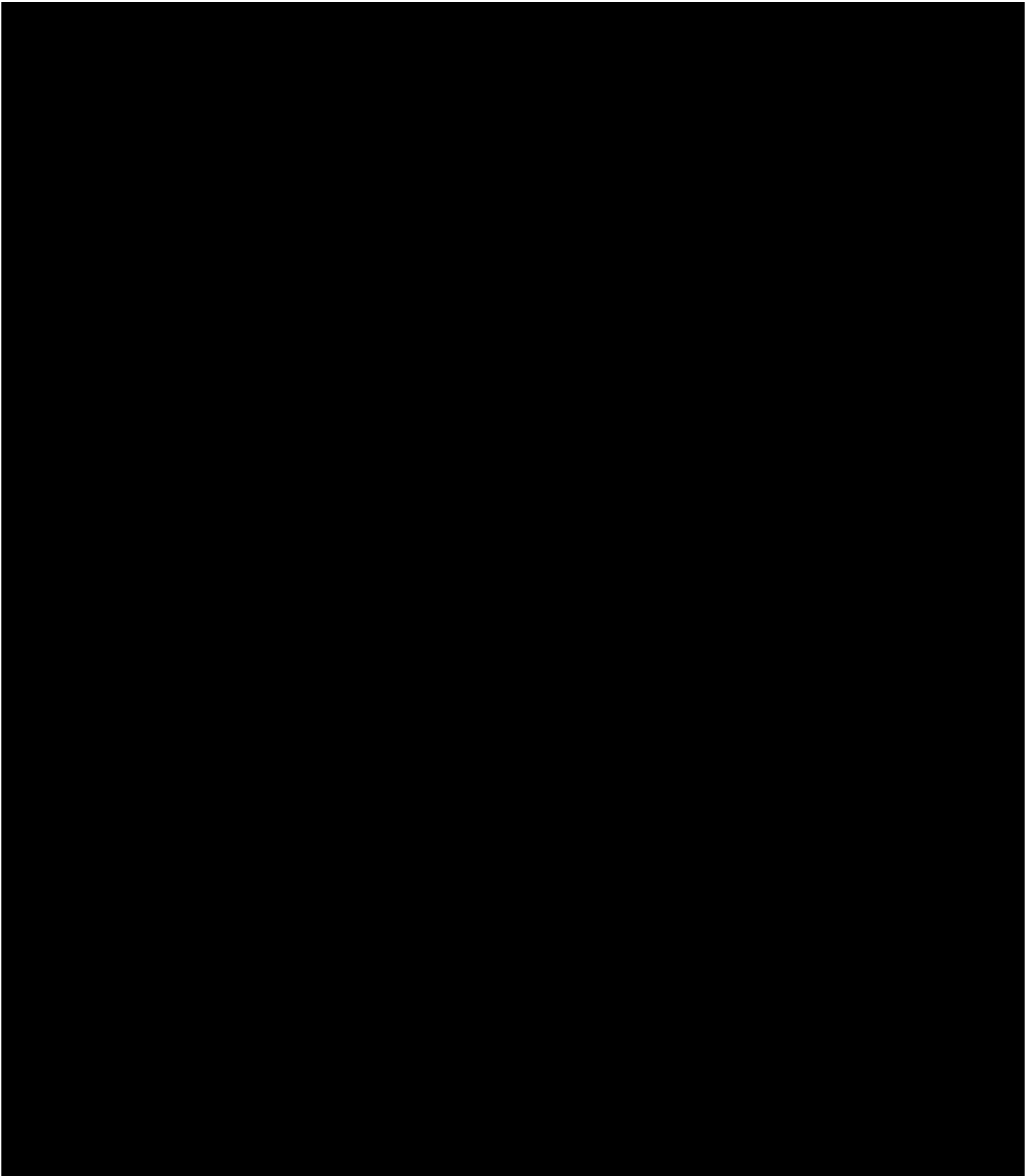
I further certify that said Limited Liability Company has paid the fees for filing the above papers required by law as shown by the records of this office, and that said Limited Liability Company is in good standing to do business in Mississippi at this time.

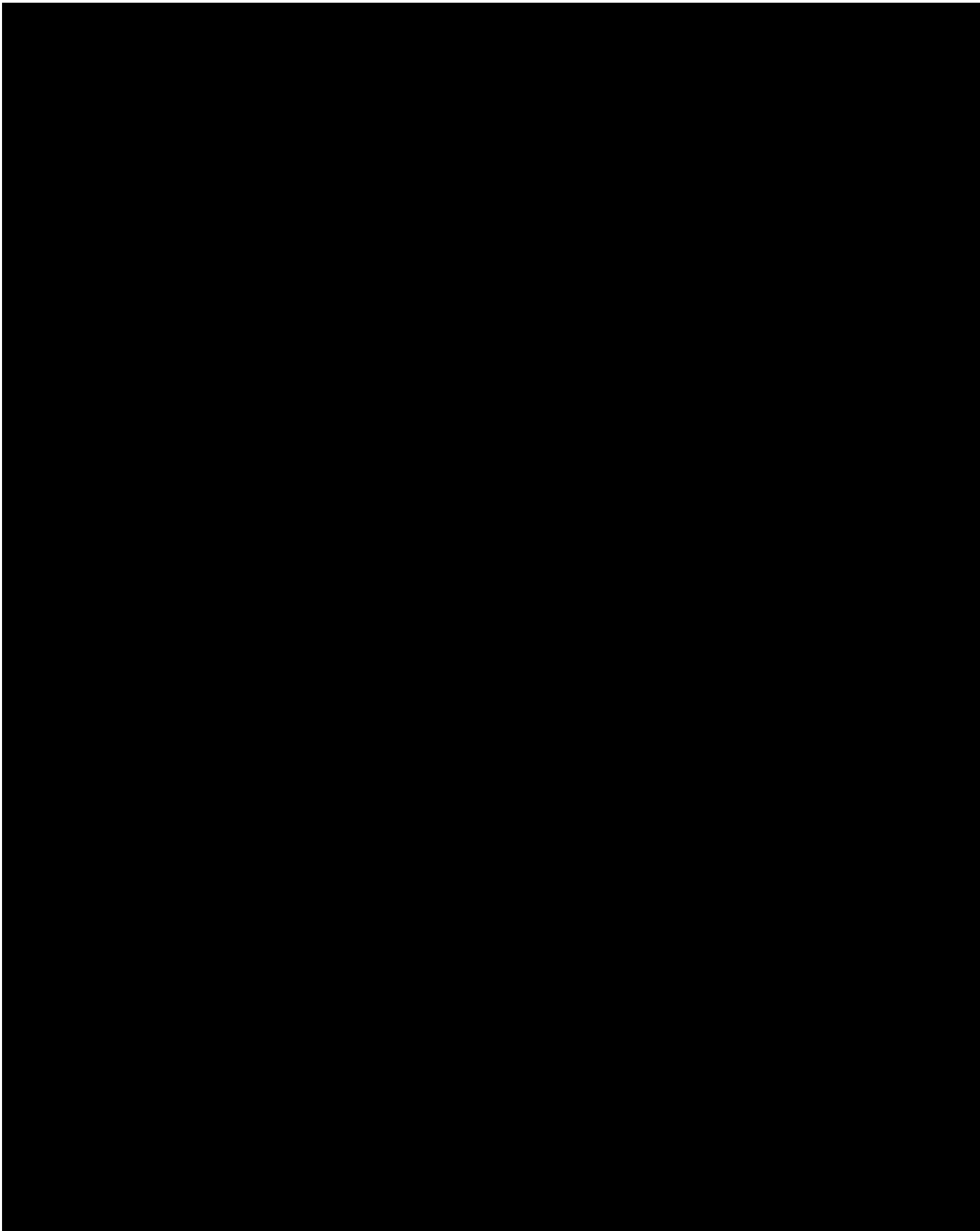
Given under my hand and seal of office
the 31st day of January, 2025

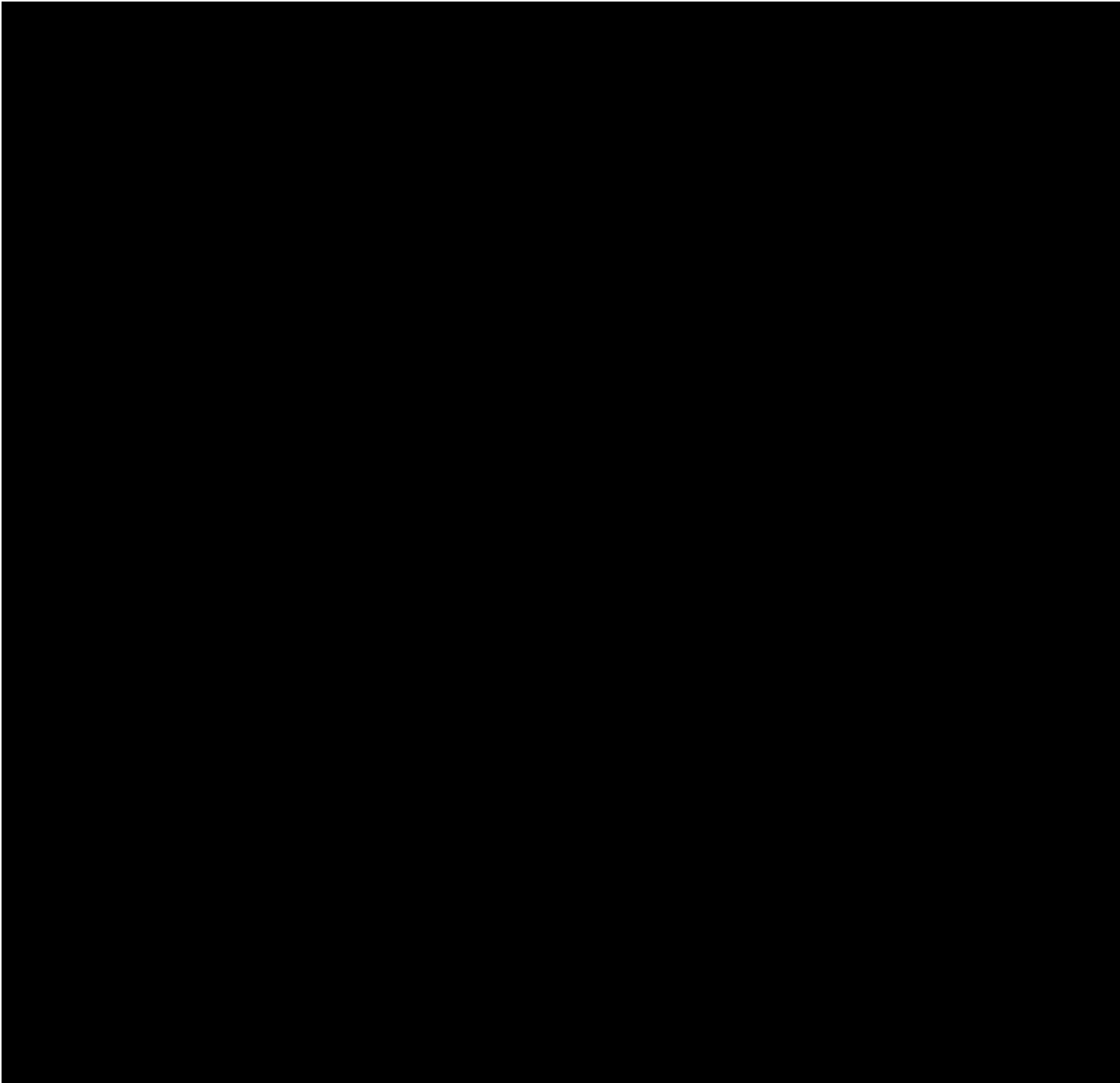
A handwritten signature in black ink that reads "Michael Watson".

Certificate Number: CN25205504

Verify this certificate online at <http://corp.sos.ms.gov/corpcnv/verifycertificate.aspx>







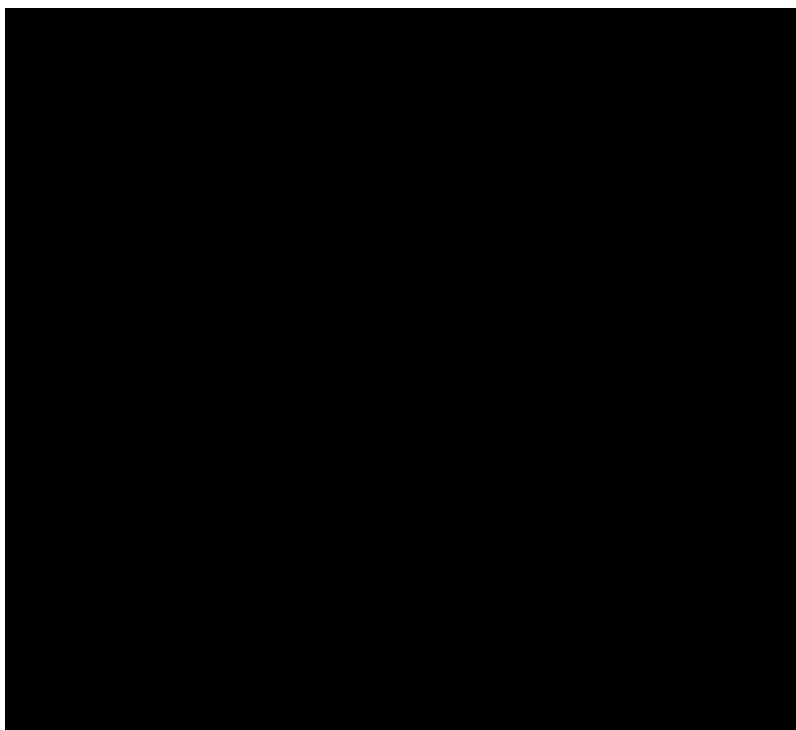
Past Performance

The following sections demonstrate AnLar’s experience conducting statewide and district-level strategic planning processes similar to the one requested by Mississippi. Each of these projects included environmental scans, soliciting broad stakeholder feedback, and developing actionable, mission-driven, and measurable strategic plans. In these examples, AnLar has highlighted key activities related to strategic planning and the expertise and process knowledge we would bring to Mississippi in conducting environmental scans, gathering broad stakeholder feedback, and

developing comprehensive strategic plans that are actionable, mission-driven, and measurable.

Mississippi State Early Childhood Advisory Council

AnLar has experience facilitating broad groups of stakeholders in Mississippi through a decision-making process that is informed by data and leads to the creation of SMART goals. AnLar provided technical support to Mississippi's State Early Childhood Advisory Council (SECAC) from 2013–2018. During that time, AnLar supported the development of annual goals and a strategic plan to coordinate efforts, programs, and resources supporting children ages birth to five years old and identify opportunities and



barriers to collaboration and coordination among programs and agencies. AnLar developed and implemented a collaborative process with the SECAC to establish goals and priorities, implement committee structures aligned to the goals, and create committee work plans with deliverables, key performance indicators (KPIs), and timelines aligned to the priorities and goals. AnLar provided all meeting organization and logistics, committee technical support, and ad hoc policy research and analysis for the SECAC and its committees' defined objectives. In addition to advising and assisting on stakeholder engagement and governance structures, AnLar completed numerous policy scans on various topics, which required AnLar to conduct multiple literature reviews on relevant research, resulting in policy and white papers being delivered to the state.

Texas Education Agency Strategic Plan

AnLar has experience collecting authentic feedback through a variety of approaches that lead to a strategic plan that is deeply informed by stakeholder input. AnLar was hired by the Texas Education Agency (TEA) to facilitate the creation of the Texas Preschool Development Grant Birth to Five (PDG B-5) Strategic Action Plan for the Texas Early Learning Council. AnLar worked with the Texas Early Learning Council, including a subset of leaders from TEA, the Workforce Commission, the Department of Family and Protective Services, the Health and Human Services Commission, the

Head Start State Collaboration Office, and the Department of Agriculture to develop and implement a strategic planning process that resulted in a five-year plan.

The final plan was based on a comprehensive needs assessment, a meta-analysis of other strategic plans that impact the plan's focus areas, extensive stakeholder engagement and input, and a deep understanding of the current challenges facing Texas. To ensure the voices of key stakeholders were captured in the plan, AnLar conducted a series of ten focus groups with several populations, such as families, early childhood teachers and administrators, program leaders, advocacy groups at the state and local levels, and state agency representatives. Activities included developing unique protocols for each target population, managing participant registrations via Eventbrite, and facilitating 1.5-hour-long



sessions via Zoom. AnLar staff reliably coded the notes for each session and identified key themes in the discussion points. AnLar then combined these key themes with the results of a stakeholder survey (4,000+ respondents) to produce a Stakeholder Engagement Report for TEA and the Governor's Office.

The final plan reflected this broad input from key stakeholders. It included KPIs for each strategic goal to ensure that TEA could monitor the plan's implementation and progress toward the outcomes identified in the plan.

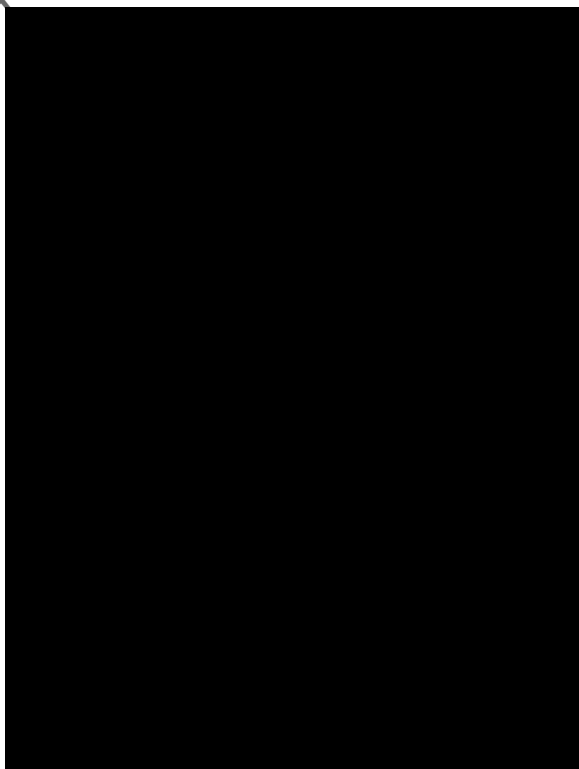
Rhode Island Department of Health and Human Services Strategic Plan

AnLar has expertise in adapting existing strategic plans to reflect current priorities and address challenges. AnLar also partnered with the Rhode Island (RI) Department of Human Services to develop its PDG B-5 Strategic Plan. The RI approach differed from that of Texas in that, rather than creating an entirely new strategic plan, the State wanted information from existing strategic plans to be summarized and re-prioritized to be aligned with the PDG B-5 grant activities. To begin the process, AnLar worked with state agency staff to identify individuals from multiple lead agencies to serve on the Design Team, the group through which all major decisions and planning would occur. As part of this process, AnLar created a stakeholder socialization plan detailing how stakeholders would be engaged in the plan's development and how the state would ensure stakeholder buy-in and engagement with the plan once it was published. AnLar worked with the Design Team to identify goals and strategies that blended the state's needs assessment findings and priorities of existing strategic plans identified by AnLar. The resulting

plan focused on areas such as workforce development, improving outcomes, governance, and expanding program capacity.

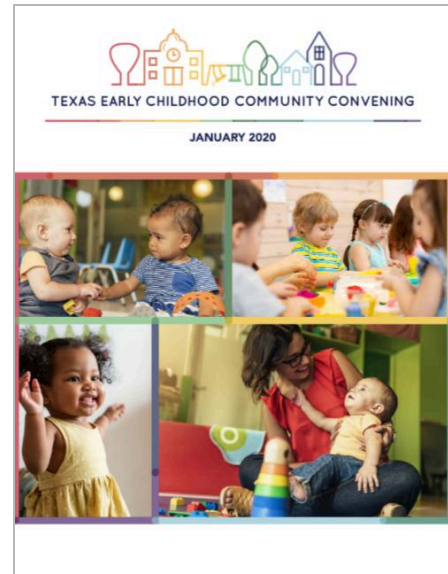
Tennessee Technical Assistance Network

For the last four years, AnLar has partnered with the Tennessee Department of Education (TDOE) as part of the statewide Tennessee Technical Assistance Network (TN-TAN) to provide comprehensive special education supports to more than 130 districts across the state, with a specific focus on strategic action planning with districts. AnLar currently supports more than 20 districts in developing and implementing strategic plans. Our work includes convening and facilitating diverse leadership teams through a strategic planning process and developing comprehensive three-to-five-year strategic plans in partnership with their stakeholders. These plans outline key goals aligned with each district's mission and vision, along with core activities and actionable steps to achieve those goals. Additionally, AnLar conducts a capacity and programmatic needs assessment, analyzes key data, and explores funding opportunities to better understand the districts' functioning, address specific challenges or problems, and identify opportunities to inform the plan and achieve the identified goals. AnLar's role in this network is to work closely with district leaders as they recruit key personnel and work collaboratively to improve practices, policies, and systems that drive program improvements for inclusion. AnLar collects data to determine the effectiveness of sessions and to inform improvements to providing support to districts. As a result of this work, AnLar has seen changes in district-level State Performance Plan/Annual Performance Report (SPP/APR) data related to student outcomes and placement in the least restrictive environment.



Texas Community Convenings

AnLar is experienced in facilitating the strategic planning process through a hybrid model of in-person and virtual convenings. In the winter of 2020, the Texas Education Agency (TEA) contracted with AnLar to offer two multi-day convenings for 40 districts and communities focused on expanding partnerships, coalitions, and strategic planning to support the roll-out of the state's PDG B-5 Early Learning Strategic Plan. Key activities included developing and implementing participant registration and all logistics (hotel space, lodging, and food and beverage) for two, three-day convenings; developing and leading plenary and breakout sessions that focus on core components and processes related to strategic planning, such as landscape and SWOT analyses, goal/strategy creation, and KPI identification. AnLar was also responsible for creating content for the Partnership Action Plan workbooks, a step-by-step strategic planning process used during facilitated team planning time. To supplement in-person activities, AnLar conducted sixteen professional learning community and webinar sessions for participants. As a result of participating, each team left with a co-created measurable strategic plan to increase access to high-quality learning opportunities in their community aligned with the states' vision.



***Cover of the Community Convenings
Strategic Planning Workbook Designed
by AnLar***

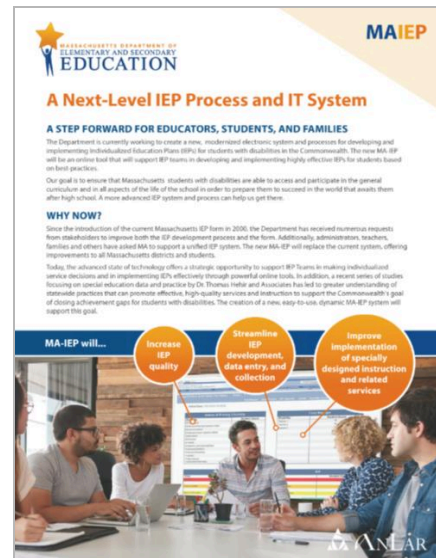
MA IEP Research and Recommendations Report

AnLar has experience creating dynamic, user-friendly reports based on reviews of existing documents and new stakeholder engagement activities. AnLar partnered with the Massachusetts Department of Elementary and Secondary Education (DESE) to conduct an environmental scan, review extant documents, and solicit stakeholder input to inform the state's next steps regarding developing a web-based individualized education plan (IEP) solution. Over the course of three months, AnLar conducted local and national market research, needs assessments, and stakeholder outreach and engagement. This research included a broad survey of existing state systems; a review of Massachusetts school districts' current IEP development tools, the cost structures of those tools, and how district-level IEP systems integrate with local data collection practices; development and fielding of an online survey to understand how family members participate in the IEP process; development and fielding of an online survey of teachers, principals, and district personnel to understand how the current IEP systems are used; development and implementation of virtual focus groups with subject matter experts; and a review of literature on best practices. AnLar conducted three virtual focus groups with state-identified stakeholders about the IEP development and implementation processes, current practices' inclusivity and cultural relevance, and how technology can and should support these processes. AnLar staff developed focus group protocols for DESE approval, facilitated the focus groups, took notes during the sessions, and analyzed the data from the groups.

Through these activities, AnLar collected data from over 5,000 individuals. Data from the interviews, surveys, focus groups, two previous Massachusetts surveys, Requests for Information (RFIs), and other extant documents were compiled and analyzed. The result was a comprehensive report that included AnLar's analyses and recommendations for the next steps. After producing the report, AnLar presented it to the executive leadership team at DESE to help them understand the national and local contexts and plan statewide revision activities based on AnLar's recommendations.

Detailed Service Plan

AnLar's proposed approach will create a dynamic, forward-looking plan that aligns with the SBE's mission and addresses today's and future educational challenges. The project timeline, organized by month, includes AnLar's proposed activities and the



**Stakeholder Messaging Document
Designed by AnLar as part of
Stakeholder Engagement**

deliverables associated with each. During the development of the project plan, AnLar will work with MDE and the SBE to refine this proposed timeline.

Proposed Staffing Structure

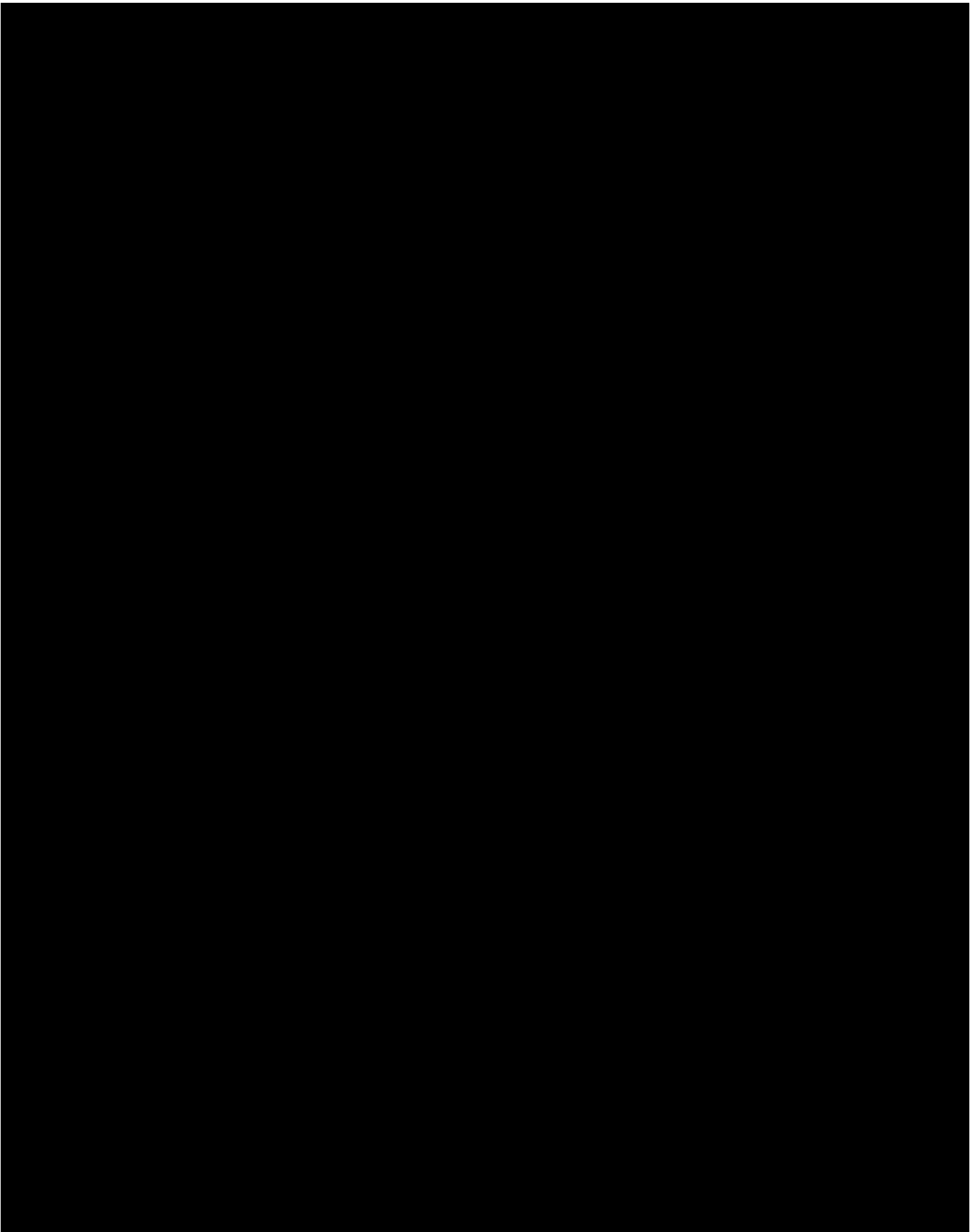
For this project, AnLar has proposed four staff members: a Project Director, a Project Manager, and two subject matter experts. In addition, our Graphic Design and Communications staff will provide graphic design support for the final Strategic Plan, Board presentation, and any other accompanying materials.

AnLar's Project Director, [Dr. Sarah Whitman](#), will serve as AnLar's Project Director, providing strategic oversight and ensuring alignment with the state's objectives. She will be the Project Team's primary point of contact, responsible for communication and overall project success. Dr. Whitman has directed multiple statewide strategic plans and will work in partnership with Ms. **[Elizabeth Colin, AnLar's Project Manager](#)**, who has supported the development of several strategic plans. Ms. Colin will be responsible for the day-to-day execution and management of the project. She will develop and manage the project plan, track progress against milestones, manage the project budget, and proactively mitigate any risks. Ms. Colin focuses on the how and when of the project, ensuring the project is delivered on time and within budget. Additionally, Dr. Whitman and Ms. Colin bring subject matter expertise to the work.

AnLar has also proposed **Ms. [Rachel Page](#) and Ms. [Britt Braun](#) as Subject Matter Experts (SMEs)**. They will provide specialized knowledge and technical expertise in the strategic planning process, stakeholder engagement, performance scorecard development, and implementation planning. Ms. Page and Ms. Braun will contribute their deep understanding of effective strategies for impactful change to ensure all deliverables' quality, accuracy, and relevance, including the final Strategic Plan.

This structure ensures clear accountability, efficient resource allocation, and effective communication, allowing us to deliver a Strategic Plan, Implementation Roadmap, and other deliverables that meet Mississippi's unique needs and context.

[Component 2](#) of this proposal includes brief biographies of each proposed staff member and their full resumes.



1. Project Initiation, Planning, and Management

AnLar’s approach to project management centers on regular and proactive communication with MDE and key stakeholders. This includes sharing progress toward project milestones and deliverables, elevating potential barriers to meeting agreed-upon deliverables and timelines, and engaging critical stakeholders to commit to and advance the work. To ensure that all project components are high quality and completed on time, AnLar will provide overall project management through a dedicated project manager and our quality assurance processes.

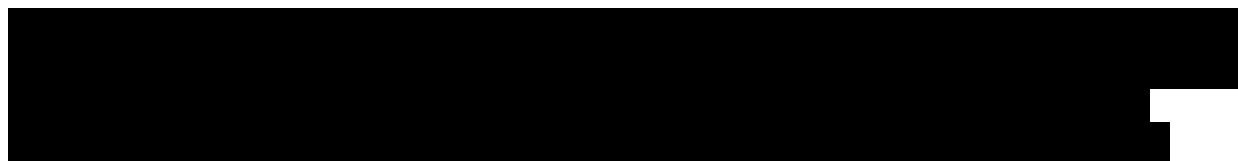
1a. Project Kick-off Meeting

Within twenty days of the contract award, the AnLar team will meet in person with key SBE and Board designees, whom we refer to as the Project Team. This meeting will help clarify the Project Team’s expectations for deliverables and invoices and solidify collaborative procedures for project implementation. Before the meeting, our team, in coordination with the Project Team, will develop an agenda and determine who should attend the meeting. The meeting will include a discussion of administrative issues followed by a discussion of the project plan, roles and responsibilities of project staff, frequency and timing of project team meetings, proposed contract work, contract management, and methods of communication between AnLar and the Project Team.

Kickoff-Meeting Outcomes

- Clarified project objectives
- Finalized project timeline
- Defined roles and responsibilities
- Identification of key stakeholders

1b. Stakeholder Identification and Mapping





1c. Project Work Plan

Within 30 days of contract execution and based on the project kickoff meeting and stakeholder mapping activity, AnLar will create a detailed project work plan using our shared project management platform on Asana or, if preferred, using another format identified by the Project Team. This project work plan will include milestones outlining actions, anticipated completion dates for each action, individuals responsible, and a method of tracking the status of each action. We will also include a timeline for stakeholder engagement, focus group protocol development, instrument validity and reliability testing. When developing projects, AnLar includes contingencies and relationships among activities in our work plans so that we can proactively identify and address any challenges that may arise throughout implementation. The Asana platform allows our clients real-time, fully transparent access to project planning and implementation information as the AnLar team updates the plan at least weekly.

Project Work Plan Highlights

- Web-based, real-time access
- Project milestones with associated timelines and deliverables
- Stakeholder engagement plan
- Communication protocols

Given the critical importance of timely, regular communication for the development and implementation of the plan, AnLar will incorporate communication protocols that detail the who, what, when, where, and how by which the project's work is communicated throughout the project's lifespan. AnLar will include communication protocols in the Project Work Plan that use clear, consistent messaging across multiple and varied outreach tools that are practical and relevant for the diverse stakeholders who can impact and will be impacted by the final Strategic Plan. The communication protocols will include passive (i.e., website, publications, social media) and active (workshops, surveys, polls) modes of outreach.

1d. Project Management

To ensure effective coordination across all project activities, AnLar proposes meeting with Project Team staff virtually twice a month following the kickoff meeting until the

plan is finalized. The bi-monthly meetings will provide updates on project progress and deliverables, discuss any areas of concern, potential problems, and possible solutions, and solicit the Project Team's input to support the co-development of all work products. At the kickoff meeting, AnLar, in coordination with the Project Team, will decide the meeting schedule and who should attend.

AnLar will work collaboratively with designated Project Team members before each meeting to finalize an agenda and provide meeting minutes within three business days of each meeting. As the project evolves, the Project Team and the AnLar team will make decisions about Project Team meeting frequency and communication mode (e.g., in-person meetings, conference calls, Zoom/web conferencing). While AnLar envisions more frequent contact at the beginning of the project, adjustments can be made as needed as the work evolves. To that end, AnLar proposes continuing with monthly meetings after the Strategic Plan is finalized to provide ongoing implementation support. Through our work with other partners, AnLar is familiar with combining distance technology with face-to-face meetings to maximize efficiency and reduce travel costs while ensuring appropriate levels of communication and coordination to achieve project goals.

Highlights of AnLar's Approach to Project Management

- Bi-monthly project management meetings
- Real time access to shared web-based project management platform
- Monthly status reports
- Ongoing risk management and timely problem resolution

To ensure that milestones, successes, issues, and risks to project success are communicated quickly, AnLar will submit written monthly status reports to the Project Team by the 10th day of each month until the conclusion of the contract. Each monthly status report will contain year-to-date information, including an updated project plan (e.g., modifications to the timeline, staff assigned, start and end dates, and completion dates); in-depth descriptions of tasks that have been completed; detailed action plans and descriptions of upcoming tasks to be completed before the following progress report; descriptions of activities and completion dates through the end of the project; problems encountered in project implementation; and any applied or proposed solutions.

AnLar will use a color-coded tracking system in the monthly status reports to indicate whether project tasks are on schedule, allowing readers to understand the deliverables' status quickly. If any deliverables fall behind their anticipated timeline, these monthly status reports will allow AnLar to identify the challenge and propose solutions to resolve any problems. AnLar will keep the project within budget by diligently tracking project costs throughout the life of the contract and will keep the Project Team updated in the "Project Costs" section of the monthly status report.

2. Environmental Scan and Data Collection

The creation of a comprehensive, actionable Strategic Plan requires a deep understanding of the current system, including where opportunities can be leveraged and needs that must be addressed. AnLar’s approach to environmental scans and data collection focuses on developing a broad and deep understanding of an organization’s context through in-depth analysis and meaningful stakeholder engagement.

2a. Review of Existing Documentation

A thorough review of existing documentation will provide valuable insight into the Board’s current Strategic Plan, offering critical context on its strategies while ensuring a deep understanding of its priorities, progress, and areas for growth. AnLar will begin the environmental scan by working with the Project Team to define priorities and areas of concern stemming from the current Strategic Plan. Then, AnLar will create a data and resource inventory that includes the current SBE Strategic Plan and any other relevant state plans, performance data, and other relevant documents to understand SBE’s context. The data and resource inventory

includes information about existing data, resources, and plans, detailing their sources, creation or revision dates, proposed strategies, existing key performance indicators (KPIs), and key elements for the new plan. For performance data, the inventory will include who collects the data and how it is collected, what is measured by the data, how the data is currently used, and how to access the data.

Once the inventory is completed, AnLar will work with the Project Team to identify key focus areas for analysis and stakeholder input. AnLar’s review will ensure that AnLar, project stakeholders, and those involved in creating the Strategic Plan have a deep understanding of the current context in Mississippi and can make informed decisions aligned with current initiatives and priorities and that address the state’s most significant areas of need. The results of this review will be incorporated into a comprehensive SWOT Analysis and Environmental Scan Report described below that includes a synthesis of the findings from the Environmental Scan and Data Collection activities and recommendations for areas of focus during the strategic planning process.

Examples of Existing Documentation for Review

- Current and Past Strategic Plans
- Performance Data
 - Student achievement data
 - School climate data
 - Financial data
- Legislative and Policy Documents
- Results of Previous Stakeholder Engagement
- Other Relevant Documents

2b. Environmental Scan



[Redacted text block]

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2c. Stakeholder Surveys/Interviews

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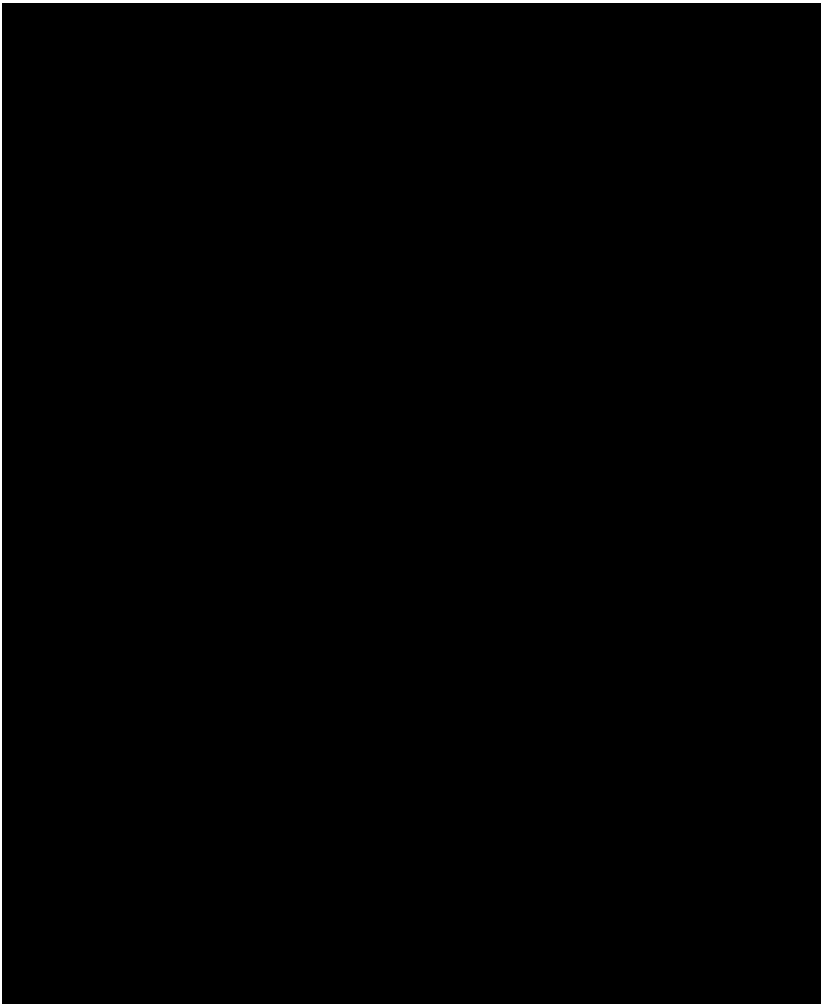
2d. SWOT Analysis

AnLar will work with the Project Team to identify strengths, weaknesses, opportunities, and threats (SWOTs) that surfaced during the previous activities. AnLar will lead a debrief session with the Project Team highlighting findings from the environmental scan, stakeholder engagement, and data collection activities. Based on this, AnLar will facilitate a SWOT analysis with the Project Team. For this initial activity, AnLar encourages participants to think broadly and inclusively, capturing all potential SWOTs. Once the initial SWOT analysis is complete, AnLar will help the Project Team identify the most critical SWOTs and explore their interactions—focusing first on interactions with threats, then with weaknesses, and finally with strengths and opportunities. These interactions will help the team later identify appropriate strategic actions. [Redacted] group participating in the strategic planning process. At the in-person strategic



2e. SWOT Analysis and Environmental Scan Report

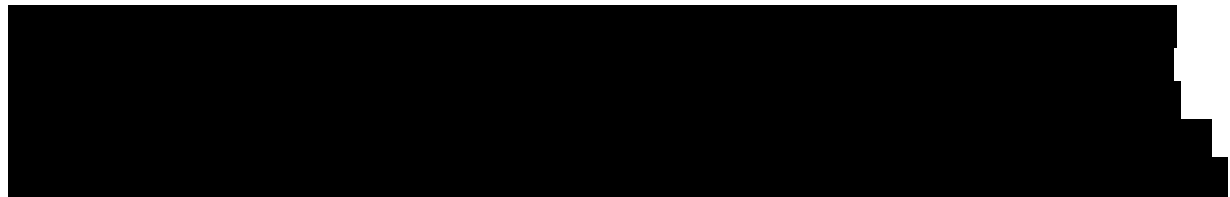
By the end of the third month of the project, AnLar will produce a final SWOT Analysis and Environmental Scan Report that reflects the work to date. At no more than 25 pages, this report will synthesize key findings in an easily understandable and usable way for the Project Team and those involved in strategic planning. This professionally designed document will serve as the foundation for the next steps in the strategic planning process. A proposed outline for the report is included and will be updated based on input from the Project Team and the findings from project activities.



3. Strategy Development

AnLar brings extensive experience facilitating diverse stakeholder groups through comprehensive strategic planning processes in various contexts, which we will apply throughout strategy development. This will maximize engagement, improve decision-making, and garner more ownership over the process and the final product. AnLar proposes a mix of in-person and virtual activities to ensure deep, sustained engagement with this process.

3a. Mission and Vision Review



[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

3b. Goal Setting

[Redacted]

[Redacted]

! [Redacted text]

[Redacted text]

3c. Strategy Formulation

[Redacted text]

[Redacted text]



4. Performance Scorecard Development

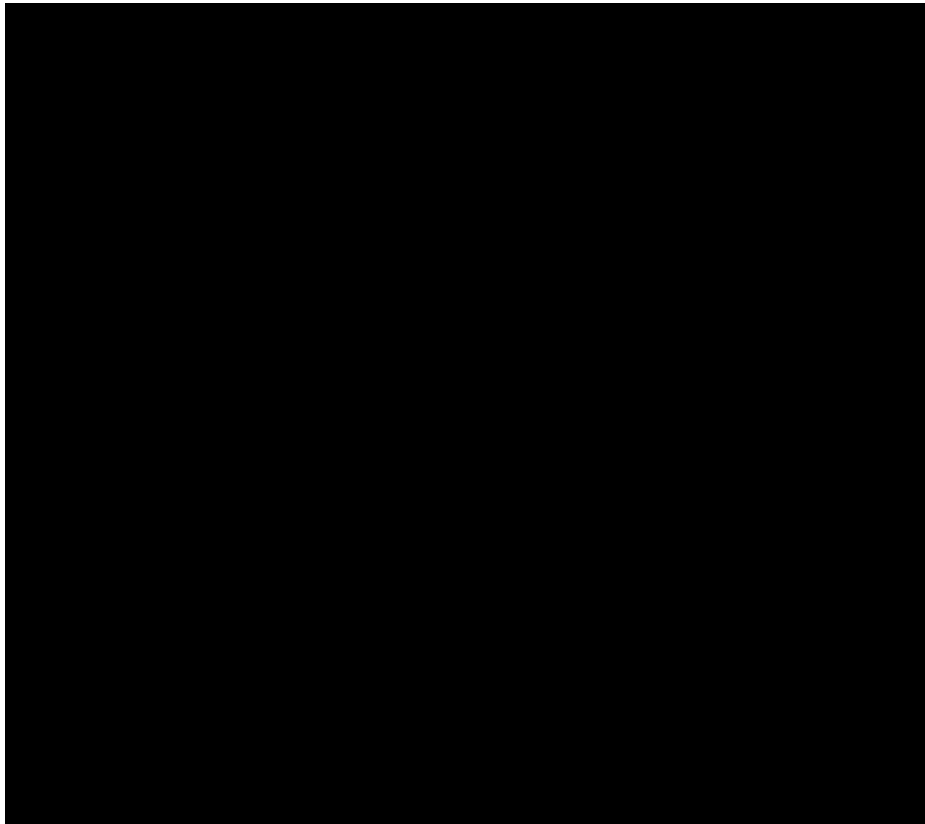
AnLar’s strategic plans are designed to be living documents. By using SMART goals, prioritizing impactful strategies, and incorporating continuous quality improvement (CQI) in our implementation planning process, we ensure that stakeholders understand whether or not identified strategies are having the desired effect and can adjust in real-time to changes in the organization’s context. The development of a Performance Scorecard will ensure the plan's usability in the long term.

4a. KPI Identification

AnLar will work with the Project Team to identify SMART KPIs for each strategic goal. Performance must be considered across multiple dimensions for each goal. Therefore, it will incorporate KPIs that measure performance across different areas, such as student outcomes, teacher retention, assessment results, and internal processes. AnLar will also ensure that KPIs track progress at various levels of the state education system (e.g., district and state). AnLar will draft KPIs for each strategic goal and engage relevant stakeholders (e.g., department heads, administrators, and subject matter experts) in the identification and development process to ensure the feasibility of each KPI. We will prioritize KPIs for which reliable data can be collected and will determine the source(s) of data for each.

4b. Scorecard Design

AnLar will work with our Data Systems and Support Team and Graphic Design Team to develop a user-friendly and interactive dashboard to display KPIs visually. AnLar will utilize interactive maps, charts, and/or graphs to effectively visualize data trends and identify areas of strength and weakness for each KPI. AnLar’s experience developing and implementing comprehensive statewide data collection and reporting systems will



inform the creation of a user-friendly, web-based scorecard that allows stakeholders to interpret progress toward goals easily.

AnLar will present draft Scorecard visuals to stakeholders for their input as part of Task 5 below to ensure those who will be accessing the scorecard find it accessible and easy to use prior to finalizing it. The final scorecard will include a high-level summary of the Plan's strategic goals and progress indicators. It will be publicly available to the extent allowable based on security and confidentiality considerations for included data.

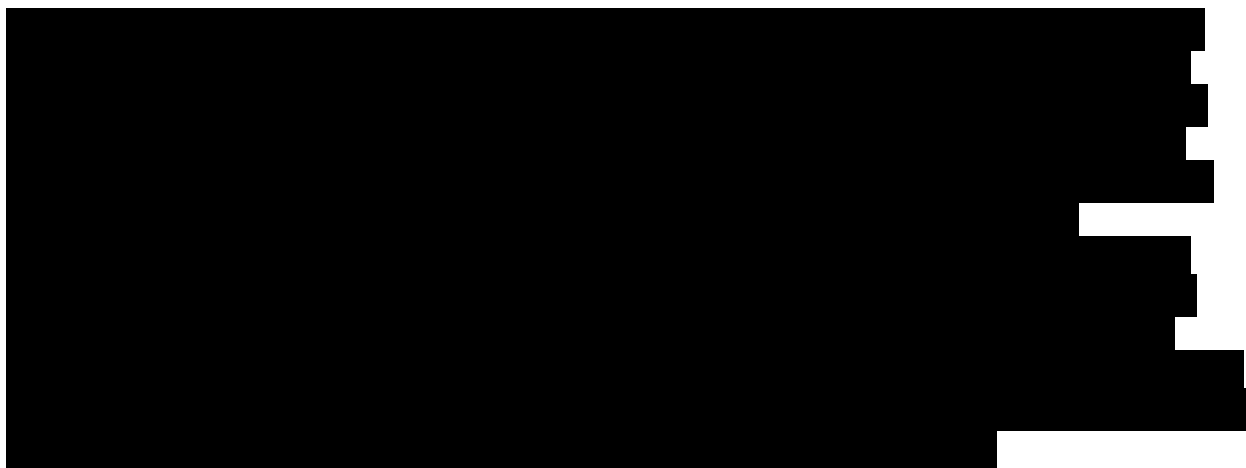
4c. Data Collection Mechanisms

Leveraging existing data systems as the primary source of data to the extent possible, AnLar will identify extant systems or create new systems for ongoing data collection to measure the effectiveness of strategies and track KPIs in the Performance Scorecard. AnLar will work with the Project Team to ensure that there are data quality checks in place to ensure the accuracy, reliability, and completeness of the data being used in the Scorecard and to ensure the security and confidentiality of all student data in accordance with federal and state privacy laws (e.g., FERPA).

AnLar will also incorporate ongoing monitoring and review into the scorecard to ensure the Board has timely, actionable information about progress toward the plan's goals. AnLar will work with the Project Team to develop a system for regular reporting on KPIs to state policymakers, school districts, and the public using the Performance Scorecard. AnLar will also ensure that the state can utilize data dashboards and reports from the Scorecard to communicate progress and identify areas for improvement. Once the Strategic Plan is finalized, in months 6-12 of the project, AnLar will work with the Project Team to review and refine the Scorecard based on data analysis, stakeholder feedback, and evolving educational needs as part of the monthly project implementation calls described in Task 8 below.

5. Stakeholder Engagement and Workshops

5a. Stakeholder Workshops



5b. Engagement Plan

[Redacted content]

[Redacted content]

5c. Feedback Incorporation

[Redacted content]

6. Drafting and Finalizing the Strategic Plan

6a. Draft Strategic Plan

Once the Project Team has reviewed the feedback from the workshops and all plan elements have been approved, AnLar will lead the development of the final Strategic Plan. The final Strategic Plan will reflect the work completed in Tasks 2 - 5 and incorporate two new sections: an Executive Summary and a Background and Overview of the Strategic Planning Process. To ensure that the plan is easily digestible and usable by stakeholders, AnLar will ensure that the draft and final plan are each no more than 30 pages.

6b. Review and Revision

Upon completion of the draft plan, AnLar will present the draft to the Project Team for review in a shared electronic file so that reviewers can see each other's feedback and revisions. Given the tight turnaround time for finalizing the plan, AnLar will provide one week for the review of the draft plan. Once AnLar receives the Project Team's feedback, if necessary, AnLar will schedule a meeting with the Project Team to discuss and clarify any feedback before revising the plan content into its final version.

After the content is finalized, AnLar's professional graphic design team will create a visually appealing, designed draft of the plan that incorporates graphics and images that align with the Board's branding and the vision for the plan. Our Communications and Design team collectively has 25 years of experience supporting a diverse range of clients and projects, creating products ranging from infographics to full branding brochures to digital newsletters to 100-page reports filled with custom illustrations and cleanly designed, informative tables. We have developed over 500 published products downloaded over 50,000 times from federal, state, and non-profit client websites. Our clients have included the U.S. Department of Education, the U.S. Department of Health and Human Services, the National Center for Education Statistics, multiple state education agencies, Vanderbilt University, KIPP Foundation, and many more. This experience will ensure that the final Strategic Plan and accompanying materials communicate the key elements of the Plan, meet the state's style and branding requirements, and are 508-compliant for web posting.

AnLar will share this designed version with the Project Team to review the new design and visual elements. The Project Team will have one week to provide input on the plan's design elements. Once again, if AnLar receives feedback that requires further discussion, we will schedule a meeting to review it prior to AnLar's design team finalizing the Strategic Plan.

6c. Final Strategic Plan

Once the content and design of the Strategic Plan are finalized, AnLar's Design and Communications team will create a professional, visually appealing, 508-compliant final product aligned with the Board's branding and incorporating the feedback received to date. The final plan will be a clear, actionable document that includes

timelines, responsible parties, and measures for ongoing evaluation for each strategy. The Design and Communications Team will also create presentation materials for the Board presentation to support the dissemination of the plan that are aligned with the Plan's style and formatting for visual continuity. Lastly, AnLar will also create a slide template that the Board can use for regular status updates with stakeholders to report on progress toward the plan's goals.

7. Final Presentation and Handover

Once the written, designed plan is finalized, AnLar will prepare for the presentation to the Board, documentation handover, and training sessions on the Performance Scorecard to ensure the plan's utilization moving forward.

7a. Presentation to the Board

AnLar will work with the Project Team to create a concise and engaging presentation that clearly articulates the following:

- The strategic planning process undertaken;
- Key findings and insights from the analysis phase (e.g., SWOT analysis, stakeholder input, environmental scan);
- The developed Strategic Plan, including mission, vision, goals, and strategies;
- The Performance Scorecard, including KPIs, targets, data sources, and reporting mechanisms; and
- The monitoring and evaluation plan, including data collection methods, reporting schedules, and mechanisms for ongoing review and adjustment.

AnLar will use presentation slides developed by AnLar's Graphic Design and Communication Team that incorporate visuals such as charts, graphs, and infographics to enhance understanding and engagement. As needed, AnLar will also create handouts or other materials for dissemination at the Board Meeting to support understanding of and buy-in to the Strategic Plan. At least one AnLar staff member will be present in person to present the Plan to the Board.

7b. Documentation Handover

Upon finalization of all documents, including the Strategic Plan, Performance Scorecard, implementation roadmap, and monitoring plan, AnLar will provide both electronic (e.g., PDF, Word documents) and print copies of all documents. We will also work with the Project Team to make key documents accessible on the Board's website.

7c. Training Session

AnLar's proposed team has designed and developed more than 300 professional learning opportunities. Grounded in our expertise in adult learning theory, AnLar will develop a comprehensive training program to educate staff on: the Strategic Plan and its key objectives; the purpose and function of the Performance Scorecard; how to collect, analyze, and report on performance data; and their roles and responsibilities in

implementing and monitoring the Strategic Plan. AnLar will create comprehensive training materials including presentation slides, an FAQ document, and a training manual. AnLar will facilitate two, up to two-hour virtual training sessions using these materials and interactive training methods, such as group discussions, case studies, and hands-on exercises. AnLar will also record these trainings so that they can be accessed by current and future staff after the contract has concluded.

8. Implementation and Monitoring Plan

A strategic plan should be a living document, informed by ongoing data collection and subject to review and revision as needed. AnLar will support the state in developing an implementation roadmap and monitoring plan.

8a. Implementation Roadmap:

Including an Implementation Roadmap, much like the Project Plan created in Task 1, provides the Strategic Plan's implementers with a list of specific steps that must be completed to achieve the Plan's goals. The Implementation Roadmap will include a phased approach to implementation with clear milestones and deliverables for each phase. This phased approach will ensure a manageable and controlled rollout while allowing for flexibility and adjustments as needed. AnLar will list specific tasks and responsible parties under each milestone. The Roadmap will also include a realistic and achievable timeline for each phase and key activity, considering resource availability and potential dependencies for each. AnLar will create high-level resource allocation plans that include the human, fiscal, and technological resources necessary for successful implementation. The Roadmap will also identify any interdependencies between tasks or phases and clearly state measurable outputs for each phase and will not exceed 25 pages.

8b. Monitoring and Reporting Mechanism

AnLar is committed to ensuring that strategic plans do not simply "sit on a shelf" but rather are carried out successfully. While success is contingent upon the creation of actionable, evidence-based strategic goals and activities, it is also the result of regular self-reflection and assessment, ongoing support, and professional development to ensure that progress is being made toward strategic goals and that activities continue to align with stakeholder needs.

AnLar will work with the Project Team to create a robust monitoring and reporting mechanism, articulated in a Monitoring and Reporting Plan, to track progress toward achieving the Strategic Plan's goals and objectives utilizing the Performance Scorecard developed in Task 4b. This monitoring and reporting mechanism will complement the Implementation Roadmap and align with current state performance review cycles to minimize the increased burden on administrators and staff. In the Monitoring and Reporting Plan, AnLar will articulate a timeline for when benchmark and progress data will be collected using the Performance Scorecard to assess strategic goal and activity progress (AnLar recommends at least bi-annually), as well as actionable steps for course-correcting if progress is off-track as detailed in the

review and adjustment protocols described in Task 8c below. The Monitoring and Reporting Plan will include performance indicators for each milestone that define measurable success. AnLar will include assigned roles and responsibilities for ongoing monitoring and specify how progress will be documented. Lastly, AnLar will include a comprehensive communication plan in the Monitoring and Reporting Plan to ensure effective and timely communication of the Strategic Plan, its progress to all stakeholders, and to ensure feedback is collected and incorporated on an ongoing basis.

8c. Review and Adjustment Protocol

As a result of ongoing monitoring activities and the evolving needs of the Mississippi education system, the Project Team may need to review and adjust elements of the Strategic Plan. AnLar will include a review and adjustment protocol in the Monitoring and Reporting Plan to ensure the relevance, effectiveness, and alignment of included strategies. Based on the timelines for assessing progress in the Monitoring Plan, AnLar will work with the Project Team to articulate actionable steps for course-correcting if progress is off-track. The results in the Performance Scorecard will enable AnLar and the Board to determine areas where additional professional development and support are needed and whether or not revisions or updates need to be made to the Plan's goals, strategies, and/or KPIs. These data-driven adjustments to the Strategic Plan will be based on data analysis, stakeholder feedback, and an evaluation of the effectiveness of current strategies. AnLar will work with the Project Team to conduct scenario planning to anticipate potential challenges and develop contingency plans to address them as part of these protocols. The use of review and adjustment protocols will ensure that the Strategic Plan remains flexible and adaptable to changing conditions, emerging challenges, and new opportunities in Mississippi.

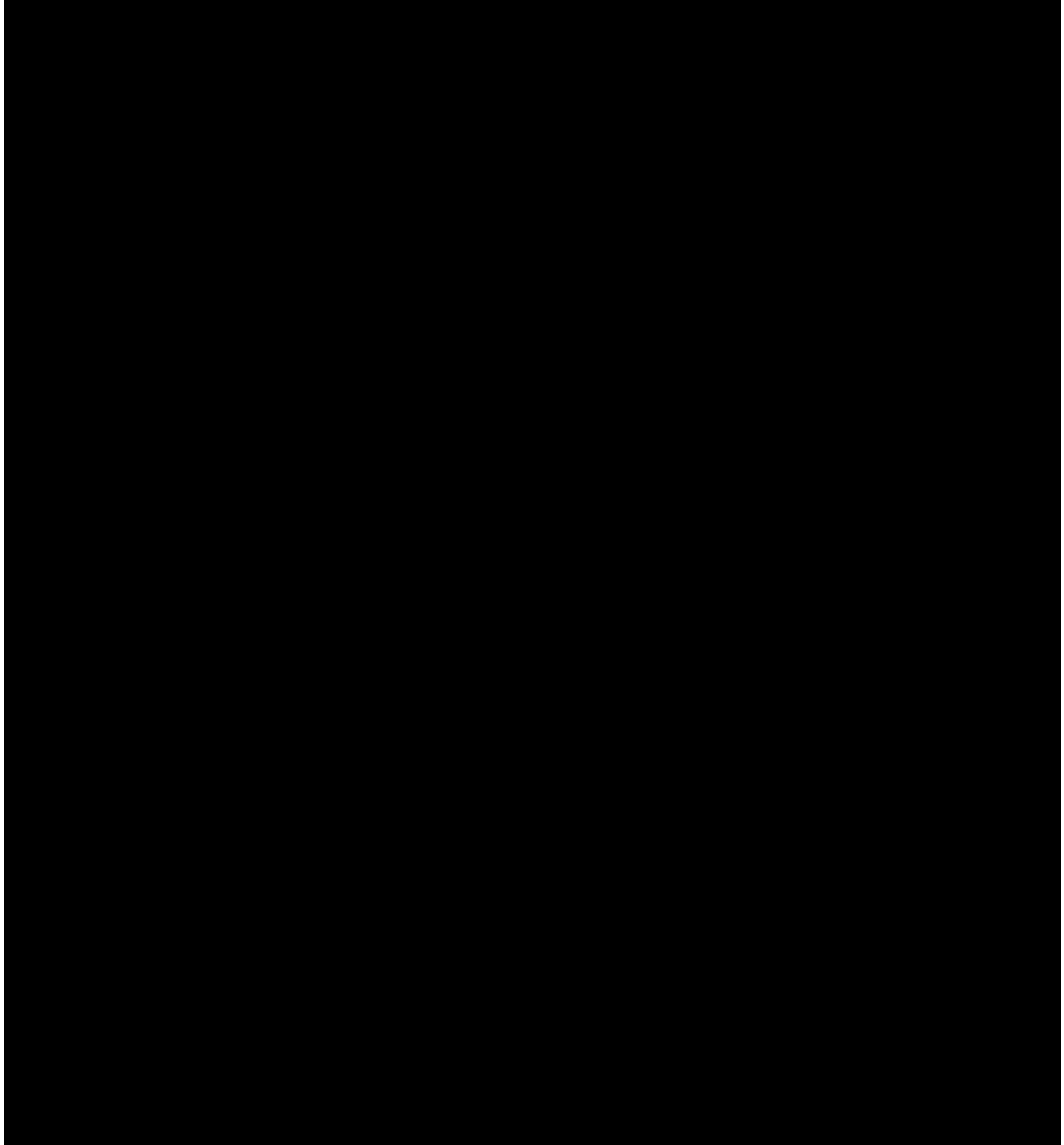
8d. Provide Monthly Support for Implementation

AnLar proposes meeting monthly with the Project Team after completing the Strategic Plan to provide ongoing consultation and support for implementation. These calls with AnLar's strategic planning and subject matter experts offer space for updates on the status of proposed activities. Additionally, this time can be used to reflect on the plans' implementation and the impact it is making in the field, identify any barriers to implementation, and develop strategies to address those barriers through either previously identified approaches in the Implementation and/or Monitoring and Reporting Plans or new approaches. Additionally, this may be a time to onboard new staff joining the Project Team and orient them to the Strategic Plan and proposed activities to drive implementation of the strategies within the plan. AnLar believes in ongoing partnerships with our clients to ensure the successful implementation of our joint efforts.

Potential Project Challenges and AnLar's Solutions

At AnLar, understanding projects and their challenges is key to success. We look at the project's goals, what needs to be done, and what problems might arise along the way. By identifying these challenges early in partnership with the Mississippi Project

Team, AnLar can plan ahead and find solutions, making it easier to stay on track and achieve the best results. The following table articulates possible project challenges with the strategic planning and scorecard development process which MBE may encounter and our proposed solutions based on our years of experience facilitating strategic planning.



Component 2 - Administration

Tab 2 - Resumes for Key Personnel

Overview of Key Personnel

Sarah Whitman, Project Director, and Subject Matter Expert

Dr. Sarah Whitman is a Senior Technical Assistance (TA) Specialist with more than 20 years of consulting and research experience in education policy, special education, implementation science, and evaluation. Dr. Whitman has developed and implemented comprehensive TA systems at the federal, state, and local levels. Dr. Whitman is the Program Coordinator for the US Department of Education's Personnel Development Program Data Collection System (PDPDCS), ensuring effective project implementation, including TA and helpline management, system maintenance, and data analysis and reporting. She has experience as a federal TA provider for the Center for IDEA Early Childhood Data Systems (DaSy), Preschool Development Grants (PDG) B-5 TA Center, and the Center for the Integration of IDEA Data (CIID).

As Project Director for this project Dr. Whitman brings more than 10 years of experience leading similar strategic planning initiatives. Dr. Whitman served as Project Director for AnLar's work with the Rhode Island Department of Health and Human Services and the Texas Education Agency in developing each state's PDG B-5 Strategic Plans. She also served as the Project Director for Tennessee's statewide TA center, leading AnLar's work supporting strategic planning across the state's more than 130 districts. Before joining AnLar, Dr. Whitman worked for the Massachusetts Department of Elementary and Secondary Education, where she was responsible for supporting statewide strategic planning and implementing statewide training, TA, and guidance activities, including providing direct support and planning services to over 400 districts. Sarah brings expertise in effective facilitation, systems change, strategic planning, data systems development, and implementation science. Sarah has a doctorate of education from Johns Hopkins focused on implementing evidenced-based systemic improvement activities statewide.

Britt Braun, Subject Matter Expert

Britt Braun is a seasoned education consultant and strategic leader with extensive experience in early childhood special education, technical assistance, and systems-level planning that she will utilize as a Subject Matter Expert on this project. As a Senior Technical Assistance Specialist at AnLar, Britt leads statewide initiatives to expand inclusive opportunities for children with disabilities, facilitate interagency collaboration, and develop data-driven strategic plans. Currently, Britt serves as the Project Director for The Tennessee Technical Assistance Network (TN-TAN,) leading a statewide technical assistance program that supports districts across the state in creating strategic action plans. With prior roles at the Louisiana Department of Education and District of Columbia Public Schools), Britt has managed federal IDEA 619B programs, developed systems to improve transitions from early intervention (Part

C) to preschool special education services (Part B), and provided expert guidance on inclusive education. She holds a B.S. in Elementary Education from Indiana University and is committed to empowering education agencies with the tools and strategies needed to drive meaningful, sustainable change.

Rachel Page, Subject Matter Expert

Rachel Page is a Technical Assistance Specialist at AnLar, where she provides project management and subject matter expertise in systems development and implementation. Currently, Ms. Page is contributing to the Tennessee Technical Assistance Network (TN-TAN) project, providing direct support to district leadership and facilitating strategic planning. Additionally, utilizing her expertise in special education regulations and policies, she manages and provides expert technical assistance to support local education agencies and early intervention providers in Massachusetts to support successful transitions of eligible toddlers with disabilities and understanding of related state and federal regulations. In her previous role as a regional early childhood and literacy specialist in Texas, Rachel worked closely with the state agency to support statewide execution of House Bill 3 which included requirements for implementation of high-quality prekindergarten and statewide training for K-3 early literacy practices. Rachel worked closely with district leadership to provide customized instructional coaching, support program evaluation and school improvement efforts, and promote systems change to develop frameworks for implementing legislative requirements. Additionally, Rachel has an M.A. in Educational Leadership from the University of North Texas and has experience supporting the Texas Education Agency's Special Projects and Instructional Materials team in leading comprehensive quality reviews of publisher instructional materials as required by state materials adoptions or special requests. Driven by a deep knowledge of public education practices, a passion for learning, and a strengths-based leadership style, she is skilled in establishing productive relationships, collaboration, and strategic planning to solve complex issues and will use these skills in her role as a Subject Matter Expert on this project.

Elizabeth Colin, Project Manager and Subject Matter Expert

Elizabeth Colin is a Technical Assistance (TA) Specialist who brings a strong focus of policy, equity, systems change, and sustainability to her work in education and special education at both local and state levels. Ms. Colin will utilize her deep process expertise and extensive project management skills in her role as a Project Manager and Subject Matter Expert for this project. Currently, as part of TN-TAN, she supports districts with program evaluation and design, strategic planning, leadership, and high-quality classroom practices. Ms. Colin integrates data analysis, root-cause analysis, stakeholder engagement, and other landscape analyses into her strategic planning efforts and change management coaching. She has led the stakeholder engagement initiatives for a project with the Ohio Department of Developmental Disabilities administering surveys, interviews, and focus groups with practitioners, leaders, and families. Ms. Colin also has expertise in policy analysis and adult learning theory. She has conducted various environmental scans on a range of key educational

topics, such as infant and toddler assessment practices, the impact of student lunch debt, and wrap-around service models in schools. Ms. Colin has a Masters in Public Policy from the University of Maryland-College Park.

Anthony Garofano and Becki Stenger, Graphic Designers

Mr. Anthony Garofano and Ms. Becki Stenger will lead the graphic design for the Strategic Plan and associated materials. Mr. Garofano, AnLar's Creative Director, has over a decade of experience designing and developing a wide variety of communications products in support of technical assistance and engagement efforts for the U.S. Department of Education (USED) and other federal, state, district, and nonprofit partners. He offers a rare combination of cross-disciplinary skills that allow him to craft high-quality visuals that clearly communicate complex information. He has provided a range of communications services, including visual design, outreach strategy design and implementation, content development, data visualization, and quality assurance. For example, his work in support of USED's Race to the Top program included communication and product dissemination planning focused on engaging with partner organizations and increasing program visibility. He also provided a range of communications services on Race to the Top–District, including the design of publications and visuals geared toward school district-level audiences.

Ms. Stenger has extensive experience creating informative graphics, diagrams, custom illustrations, infographics, and other visuals to illustrate complex information and abstract concepts. She has created custom designs for publication covers, interface graphics, newsletters, presentations, and various other products to assist in the effective delivery of information for various state departments of education and USED programs. Ms. Stenger has brought fresh, critical eyes and a clean, modern design sense to a broad range of USED publications and web products. Her acute attention to detail in textual and visual components ensures that AnLar's design and communications products contain high-quality information and design. Ms. Stenger has extensive experience formatting publications and has developed over 150 508-compliant publications for state education agencies and USED. For this project, the design team will create consistent style and branding for all Strategic Planning materials, including ensuring 508-compliance for web materials.

Resumes for Key Personnel

Sarah Whitman, Ed.D.

Senior Technical Assistance Specialist

swhitman@anlar.com

Key Qualifications

- More than 20 years of experience working in and supporting state education agencies and nonprofit organizations
- Served as the project director for the development of statewide strategic plans in Texas and Rhode Island and district strategic plans statewide in Tennessee
- Deep background and expertise in qualitative and quantitative data analysis, including development of high-quality, user-friendly data systems and reporting tools
- Doctoral degree in implementation science with a focus on implementing evidence-based improvement strategies to fidelity statewide

Experience

Senior Technical Assistance Specialist, AnLar (Arlington, VA) 2017–Present

- Serves as a project director and content expert leading client engagement for district, state education agency, and federal PreK to postsecondary education projects up to \$4.5 million in contract value.
- Acted as a national TA provider for the federally funded Center for the Integration of IDEA Data (CIID), The Center for IDEA Early Childhood Data Systems (DaSy), and the Preschool Development Grant Birth to Five (PDG B-5) TA Center.
- Provides technical and content expertise on complex implementation projects related to PreK-12 education, special education, early childhood special education, and data systems development and implementation including:
 - Directing several systemic improvement projects, such as the development of PDG B-5 Strategic Plans for Texas and Rhode Island, the evaluation of state systemic improvement plans, the facilitation of statewide advisory councils, the revision of statewide quality rating systems, and the implementation of statewide TA.
 - Offering leadership and subject matter expertise on topics including systems building, data governance, supporting and engaging with diverse populations, strategic planning, capacity building, data literacy, improving data infrastructure, program evaluation, and the implementation of evidence-based practices.

Advisor, Strategic Data Project, Harvard Center for Education Policy Research (Cambridge, MA) 2024-Present

- Serves as an advisor to 15 CEPR early childhood Strategic Data Project (SDP) Fellows.

- Co-facilitates a working group of fellows to help realize SDP's vision of advancing early education analytics.
- Designs and delivers training and collaboration opportunities for six workshops over two years (virtual and in-person).
- Co-manages the production of at least two public deliverables to be disseminated as SDP resources.

**Early Childhood Outcomes Coordinator and Data Analyst
(Educational Specialist C), Massachusetts Department of
Elementary and Secondary Education, Special Education
Planning and Policy Development Office (Malden, MA)**

2012–2017

- Co-lead on the State Systemic Improvement Plan, a federally-mandated multi-year initiative to improve outcomes for children with disabilities. Responsibilities included data analyses, stakeholder engagement, authoring federal reports, and development and implementation of project evaluation plan
- Responsible for the statewide collection, analysis, and federal reporting for three indicators of state-level performance in serving children with disabilities: Indicators 6, 7, and 17
- Oversaw the statewide implementation of the Pyramid Model, a tiered system of support, including the procurement of national trainers, recruitment of districts to participate, and training of state-level coaches
- Developed a multi-year statewide professional development grant and related training opportunities for over 400 school districts to support performance improvement and transformational practices
- Developed inter-agency statewide initiatives to support improved longitudinal outcomes for students
- Designed more than twenty different face-to-face and online professional development trainings to increase the statewide capacity of educators, including courses on data use for continuous improvement

**Research Associate and Student Interest Group (SIG)
Program Coordinator (Promoted from Program Assistant)
Program on Negotiation (PON) at Harvard Law School
(Cambridge, MA)**

2007-2012

- Worked with the 8 major PON research initiatives to track progress and ongoing research
- Initiated, implemented, and evaluated student-oriented activities, including the PON Career Series, Internships, Student Discussion Groups, grants, and the PON Fellowship Programs
- Facilitated student involvement in PON, which included over 1200 SIG members, and served as a resource to students interested in negotiation and dispute resolution

- Oversaw all SIG financials, including budgeting, disbursements, and university reporting
- Supervised graduate student assistants, volunteers, and interns
- Outreach responsibilities included liaising with partner academic institutions, designing and disseminating relevant materials, and promoting relationships among faculty, mentors, and students

Research Coordinator for Evaluation (Promoted from Research Assistant for Evaluation), Facing History and Ourselves (Brookline, MA) 2006-2007

- Assisted in the development, recruitment, and implementation of a national experimental study with over 100 school and 250 teacher participants
- Advised nine regional directors regularly regarding ongoing evaluation research, including the development of new organizational policies and procedures
- Collected, analyzed, and generated regular reports on evaluation surveys
- Assisted in developing and writing presentations for internal and external audiences
- Implemented a new departmental organizational system, including an online database
- Generated presentations and reports for directors, the organizational board, and the public

Graduate Research Assistant (Promoted from Undergraduate Research Assistant), The Center for the Study of Psychology and Religion at the Danielsen Institute (Boston, MA) 2004-2005, 2006-2007

- Supported faculty qualitative and quantitative research
- Conducted interviews of experiment participants and community members for research projects
- Assisted in the development of grant proposals and edited documents and webpage
- Prepared presentations for major national conferences

Education

- Johns Hopkins University
Ed.D.
- Harvard University
Ed.M., Education Policy and Management
- Boston University
M.A. Religion and Society
- Boston University
B.A., Double Major in Psychology and Religion

Selected Conference Presentations

- **Invited Presentation:** Leading from the Start: Developing Leadership Capacity in New Practitioners, Council for Exceptional Children – Division for Early Childhood National Conference. Virtual, March 2021
- **Invited Presentation:** Evaluating and Selecting Technology for IEP Development: Lessons Learned from a Statewide Study. Council for Exceptional Children National Conference. Virtual, February 2021
- **Invited Presentation:** Community Partnerships Supporting Students with Disabilities from Early Intervention to Secondary Transition, Council for Exceptional Children National Conference. Virtual, February 2021
- **Invited Presentation:** Managing Up: Using the DEC Recommended Practices for Leadership as a New or Beginning Practitioner Confirmation. Division for Early Childhood National Conference. Dallas, TX, October, 2019
- **Invited Presentation:** Managing Up: Using the DEC Recommended Practices for Leadership as a New or Beginning Practitioner Confirmation. Division for Early Childhood Learning Deck Webinar. Virtual, March, 2019
- **Invited Presentation:** Sustainable Model of Professional Development to Improve Early Childhood Leadership and Programs. Division for Early Childhood National Conference. Orlando, FL, October, 2018
- **Invited Presentation:** Implementing and Scaling the Pyramid Model in Massachusetts' Public Schools—from Policy to Practice. Massachusetts Pyramid Model Partnership Summit. Westford, MA, April 2016
- **Panel Presentation:** Digging Deeper: Helping Programs Use Child Outcomes Data to Improve Services, Improving Data, Improving Outcomes Early Childhood National Conference, New Orleans, LA, September 2014
- **Panel Presentation:** Special Education Policy in Texas and Massachusetts. Harvard Graduate School of Education Student Research Conference. Cambridge, MA, April 2012

Awards

- Commonwealth of Massachusetts State Senate Official Citation
- Commonwealth of Massachusetts House of Representatives Official Citation
- Commonwealth of Massachusetts, Office of the Governor's Performance Recognition Award for Outstanding Performance on the State Performance Plan/Annual Performance Report (SPP/APR)

Volunteer Activities

- Public Schools of Brookline Expert Advisory Panel Member - Educational Excellence and Equity (2020–Present)
- Circus Up - Chair of the Evaluation and Grants Committees (2019–Present)
- Brookline Commission for the Disabled (2011–2017)
- Massachusetts Special Education Surrogate Parent Program (2011–2012)

Britt Braun

Senior Technical Assistance Specialist

bbraun@anlar.com

Key Qualifications

- More than five years of experience leading statewide initiatives with proven ability to design and implement strategic plans, facilitate interagency collaboration, and develop policies to support state and local initiatives.
- Successfully managed and facilitated tiered technical assistance models for state and district education agencies, ensuring alignment with federal IDEA regulations and best practices to support local implementation efforts.
- Expertise in using data to inform policy decisions, track program effectiveness, and drive continuous improvement efforts, ensuring alignment with state and federal priorities.

Experience

Senior Technical Assistance Specialist, AnLar (Arlington, VA) 2021–Present

- Serves as the project director for district, state and federal projects related to early childhood special education. Projects include:
 - Serving as a statewide vendor for technical assistance through intensive and targeted support, and the implementation of strategic action planning, to expand access to inclusive opportunities for young children with disabilities across early childhood programs.
 - The facilitation of a tiered technical assistance approach, including the development of a Memorandum of Understanding (MOU) for local Early Intervention Agencies and LEAs, to transition eligible toddlers with disabilities from Part C Early Intervention to Part B Preschool Special Education.
- Provides technical assistance and subject matter expertise in a variety of areas, including early childhood, early intervention, special education, family engagement, and facilitation and coaching.

Education Program Consultant, 619B Coordinator, Louisiana Department of Education (Baton Rouge, LA) 2019–2021

- Develop and implement strategies to improve implementation of services for children with disabilities ages 3-5 in general education early childhood settings, including screening, intervention, referral and inclusion practices
- Manage effective implementation of pilot programs through execution of contracts and interagency agreements, facilitation of in-person and virtual convening's and the development of tools and resources

- Monitor and manage reporting of Federal IDEA 619B Indicators 6, 7, and 12 as part of annual OSEP reporting
- Monitor and manage the Federal IDEA 619B budget to ensure that funds are allocated in compliance with IDEA regulations and in alignment with key departmental strategies.
- Provide technical assistance and ongoing support to school systems and monitor data in Teaching Strategies GOLD OSEP license to ensure accurate and complete data as required for OSEP reporting
- Develop and implement strategies to improve K-2 literacy initiatives that are aligned to the departments vision and strategic priorities of improving outcomes for all children
- Appointed member of the Louisiana Children’s Cabinet Advisory Board, State Advisory Council for the Infant Deaf and Hard of Hearing and Early Childhood Care and Education Committee

**Senior Educator at Turner Elementary School, ECE Learning Lab,
District of Columbia Public Schools Public Schools (Washington, DC) 2017–2019**

- Manage the launch and implementation of the Learning Lab Program at Turner Elementary School
- Support teachers, paraprofessionals and administration in successfully increasing the ECE programs overall CLASS scores from SY 16/17 to 17/18 to surpass national thresholds
- Plan and facilitate ongoing professional development for a team of teachers, including individualized weekly observations and debrief meetings, and weekly content, data and planning seminars
- Foster a collaborative work environment and professional learning community across a broad range of Early Childhood topics, including Trauma-Informed Practice, Classroom Environment, Concept Development, Regard for Student Perspective, and Language and Literacy Development
- Conduct formal and informal observations and assessments of teachers to provide feedback on instructional delivery and implementation of best practices in Early Childhood Education
- Provide professional learning opportunities to visiting administrators and teachers through a demonstration of best practices
- Presented at the National Association of Education for Young Children

**Planning Manager, ECE Learning Lab,
District of Columbia Public Schools (Washington, DC) 2016–2017**

- Managed the development of the ECE Learning Lab, an initiative designed to provide teachers from around the District an opportunity to observe best practices
- Conducted extensive field research at eight Extended Year Schools to develop a school-based plan for the development of the ECE Learning Lab

- Developed the procedures and policies that would accompany the development of a sustainable program that is unique to DCPS
- Identified successful operational and project management methods
- Built relationships and liaised with various internal Central Office departments to drive collaboration and project success

Kindergarten Teacher, J.O. Wilson Elementary (Washington, DC) 2013–2016

- Implemented inquiry-based learning of Common Core State Standards through Tools of the Mind curricula
- Utilized developmentally appropriate approaches to learning, with an emphasis on guided reading, close reading, focused small group literacy skill building, math and literacy-based centers, and scaffolded writing
- Experienced with teaching marginalized students, including at-risk students, students with IEPs, and students eligible for free and reduced-price lunch

Preschool Teacher, J.O. Wilson Elementary (Washington, DC) 2010–2013

- Implemented Tools of the Mind curricula, with a focus on self-regulated learning through intentional make-believe play
- Evaluated students using GOLD, an observation-based assessment aligned with Kindergarten Readiness Standards to measure school readiness for early learners

Preschool Teacher, Washington DC Jewish Community Center Preschool (Washington, DC)

2009–2010

- Developed, delivered, and evaluated a Reggio Emilia inspired educational program

Student Teacher, Prep Grade, Croydon Hills Public, Primary School (Croydon, Australia)

2008

- Implemented state curriculum to encourage inquiry learning through topic development.

Education

Indiana University (Bloomington, IN)

- B.S., Elementary Education (K-6)

Skills and Accomplishments

- Appointed as a member of the Louisiana Children’s Cabinet Advisory Board.
- Appointed as member of the Louisiana Advisory Council for the Infant Deaf and Hard of Hearing.
- Appointed as a member of the Louisiana Early Childhood Care and Education Committee.
- Experience and former certification in Toddler and Preschool Classroom

Assessment Scoring System (CLASS).

- Former member of the Council for Exceptional Children.
- 2021 Anti-Defamation League (ADL) Glass Leader Institute (GLI) Participant.
- Attended Practice-Based Coaching Training Institute (PBCTI).
- Trained in Tools of the Mind curricula, GOLD, LETRS, Flamboyant, and Responsive Classroom.
- Served as Teacher Representative for Parent Teacher Association (2015-2016)
- Nominated for the Excellence in Classroom Innovation Award (2014)
- Elected as Early Childhood (2011-2013) and Kindergarten Grade Level Chair (2013-2016).
- Classified as a Distinguished Teacher, according to LIFT.
- Rated a Highly Effective teacher under IMPACT for five consecutive years (2011-2016).

Conference Presentations

- 2018 NAEYC Annual Conference, *Demonstrating Developmentally Appropriate Practice and Rigor in an Urban School District; Early Childhood Education Learning Lab*
- 2021 LDOE Teacher Leader Summit
- *Inclusive Practices in Pre-K, All Means All!*
- *Inclusion Pilot Learning from the Field*
- *Early Childhood Inclusion, Using Data to Make Meaningful LRE Decisions*
- 2024 Division of Early Childhood of the Council for Exceptional Children (DEC), *Expand Your Leadership Vision with the Habits of a System Thinker*

Publication Contributions

Louisiana Department of Education, February 2022

[Early Childhood Developmental Screenings Guidebook](#)

- Updated and revised the previous version of the Developmental Screening Guidebook.
- Restructured guide to include resources specific to educators, providers, families, and community entities.

Louisiana Department of Education, July 2022

[Louisiana's Early Childhood BE ENGAGED® Birth to 5 Framework](#)

- Served as member of the Early Childhood Family Engagement Stakeholder Committee.

Louisiana Department of Education, December 2020

[Early Childhood Transition Process](#)

- Updated and revised the previous version of the Early Childhood Transition Process

Rachel Page

Technical Assistance Specialist

rpage@anlar.com

Key Qualifications

- Leads and provides expertise to state and district projects centered on enhancing access to inclusive and high quality services for children with disabilities, with a strong focus on strategic planning to improve and sustain systems.
- Leverages expertise in public education and policy to support continuous improvement through detailed program evaluation and strategic planning with local, state, and community stakeholders.
- Utilizes data-driven approaches to analyze and interpret information, identifying key factors and root causes to guide improvement efforts at both local and state levels, addressing diverse program needs and identifying equitable solutions.

Experience

Technical Assistance Specialist, AnLar (Arlington, VA) 2022–Present

- Leads and manages district and state projects focused on early childhood special education and early intervention. Projects include:
 - Providing tiered technical support for a state education agency project that integrates professional development and district strategic planning to expand high-quality inclusive opportunities for preschool children with disabilities.
 - Led a statewide CSPD needs assessment for Part C of IDEA for the state Department of Public Health (DPH), conducting stakeholder engagement, landscape analysis, organizational mandate scan, and SWOT analysis to evaluate system-wide needs in professional development, training, and support, resulting in recommendations for improvement.
 - Provide subject matter expertise and project management to implement a tiered technical assistance approach, including developing an MOU for local Early Intervention Agencies and LEAs, to support the transition of eligible toddlers with disabilities from Part C Early Intervention to Part B Preschool Special Education.
- Leverages early childhood expertise to deliver technical assistance, consultation, professional development, and strategic planning for early education clients.
- Provide technical assistance and strategic planning guidance to federal, state, and local clients in early childhood and special education.

- Facilitate internal and client-facing meetings to support project goals.
- Collaborate with stakeholders to enhance early childhood education initiatives.

Engagement Manager, Safal Partners

2022

- Supported the Texas Education Agency’s Special Projects and Instructional Materials team in implementing quality reviews of publisher instructional materials.
- Developed processes and quality rubrics to evaluate materials aligned to state standards.
- Recruited and trained Texas educator experts, and led review teams to collect evidence and reach consensus on quality reviews.
- Conducted thorough reviews and coordinated the validation of instructional materials reports for publication on the state's instructional materials review website.

Education Specialist - Early Childhood, RLA, Texas Reading Academies

Cohort Leader, Education Service Center Region 12

2017–2022

- Provided expert assistance & professional development to district leaders and educators specifically related to implementation of legislation and high-quality prekindergarten and early literacy practices.
- Provided data-driven coaching and leadership to early childhood team, using research-based strategies and goal setting tools to offer actionable feedback and drive outcome-focused problem solving.
- Assessed district needs for school improvement, led the review of early childhood data systems, developed local improvement plans, and directed strategic planning and program enhancement processes using program evaluation and self-assessments.
- Partnered with community stakeholders to increase regional high-quality early childhood programs and school readiness.
- Facilitated Texas Reading Academy cohorts through online coursework, fostering a literacy community, providing individualized support, guiding activities and discussions, and ensuring fidelity in content delivery and program requirements.

Early Childhood Content Expert, Contractor, Safal Partners

2020-2021

- Served as a lead content expert for the prekindergarten instructional materials review ensuring rubric alignment and high-quality final reports.
- Authored evidence guides to support review teams in identifying high quality practices and evidence aligned to the Texas Prekindergarten Guidelines.

**Early Childhood Special Education Team Lead, Teacher,
Pearson Early Childhood School, Plano ISD**

2006-2017

- Supported teachers through instructional coaching.

- Provided leadership to ensure compliance with local policy, state regulations, and federal regulations and indicator requirements.
- Used multiple methods of data collection to inform instructional practice and improve child and program outcomes.
- Fostered collaborative teaming processes for IEP development and implementation.
- Created a culture of learning through reflective practice and professional learning communities engaged in data inquiry, analysis, and action.

Education

- University of North Texas
M.A. Educational Leadership
- The University of Oklahoma
B.A. Special Education

Professional Certifications

- Colorado Professional Teacher License endorsed in: Early Childhood Education, Special Education, Principal (In Progress)
- Texas Standard Certification in Principal, Special Education, Generalist, ESL Supplemental

Skills & Proficiencies

- Instructional design for in-person and eLearning professional development
- Excellent presentation and communication skills
- Canvas LMS, Camtasia, Google Workspace, Zoom, Padlet, various digital collaboration, graphic design, marketing, and presentation tools
- Certified Texas Reading Academies Facilitator
- Instructional Coaching models - Children's Learning Institute Core Competencies, NAEYC Coaching with Powerful Interactions, "See it, Name it, Do it"
- Trained in Conscious Discipline and Pyramid Model
- Certified CIRCLE Preschool Foundations Trainer
- Curriculum alignment and instruction, DDI, PLC facilitation
- Flexible and resourceful to meet changing demands of state and federal education initiatives
- Project management

Elizabeth Colin

Technical Assistance Specialist

ecolin@anlar.com

Key Qualifications

- Coaches district leaders to develop strategic plans aligned to organizational goals using SWOT analyses, stakeholder engagement, landscape analyses, and goal and vision setting.
- Skilled in analyzing, interpreting, and applying education policy to inform decision making and program improvements.
- Applies system thinking concepts and frameworks to create sustainable change initiatives.
- Engages and collaborates with diverse stakeholder such as families, school district teachers and administrators, and community members to develop comprehensive plans to serve children and improve education programs.

Experience

Technical Assistance Specialist, AnLar (Arlington, VA) 2021–Present

- Serves as project manager and project director for state-level projects, collaborating with clients to set priorities, implement new initiatives, and achieve client goals, while monitoring progress and managing project budgets.
- Lead research-driven tasks and environmental scans, including data collection, analysis, synthesis, and report writing.
- Provide technical assistance and strategic planning guidance to state, and local clients for early childhood education and early childhood special education.
- Develop content, facilitate sessions, and offer subject matter expertise for professional development, webinars, communities of practice, and resources on DEIJ, leadership development, systems change, trauma-informed learning, early intervention, and early childhood special education.
- Plan and facilitate internal and client-facing meetings to drive collaboration and decision-making.

Technical Assistance Intern, AnLar (Arlington, VA) 2021

- Supported technical assistance through research and analysis of early childhood special education and early childhood educator credentialing, assessment, and evaluation.

- Supported and conducted the research on a client-based project regarding early childhood special education, specifically around federal law (IDEA Part B and Part C).

**Graduate Coordinator, Leadership & Community Service-Learning,
University of Maryland, College Park**

2020–2021

- Supervised 30 college students throughout a semester community service and engagement program.
- Advised students through a socially responsible leadership curriculum that focused on social issues, social change, ethics, integrity, community voice, identity exploration, and professional development.
- Supported program management, marketing, and logistics efforts – wrote annual reports, managed budget, and researched and wrote grants.
- Created assessments to evaluate and measure the program’s efforts at the end of each academic semester.

Student Aide, Center for Young Children (College Park, MD)

2017–2020

- Interacted with a classroom of 3 to 4-year-olds during learning stations to facilitate child development and preschool knowledge content.
- Prepared classroom through cleaning, setting up materials and ensuring enough supplies for daily schedule.
- Assisted teachers with classroom control and supervision – behavior management, conflict resolution, social-emotional development.

**Spring Intern, Prince George’s County Department
of Social Services(Landover, MD)**

2018–2019

- Researched community school policy and wraparound services – best practices, effectiveness, and funding sources.
- Developed research and presentation on the Transforming Neighborhood Initiative @ School (TNI@School)’s budget, funding, and sustainability.
- Created a literature review for the TNI@School white paper.
- Assisted the management team of TNI@School program through keeping meeting notes, transcribing videos, collecting donations, conducting interviews, and following up with social workers.

**Teaching Assistant, Statistical Methods
in Psychology (College Park, MD)**

2017–2018

- Communicated with professor, students, and fellow TAs regarding student achievement.
- Mastered computing statistics and data analysis skills
- Led exam reviews sessions for students to attend, prepare, and ask questions on exam material.
- Taught concepts and course material and acted as a resource for students.
- Graded assignments to streamline the workload of Graduate TAs.

Policy Research Experience

Graduate Consultant, United States Government Accountability

Office (GAO), University of Maryland, College Park; Washington, DC 2020–2021

- Conducted research on the prevalence, causes, and consequences of student school meal debt.
- Analyzed and recommended policies for the prevention, collection, and offset of school meal debt on local through federal levels.
- Maintained communication and was responsive to project, research, and writing requests from the client (GAO).
- Compiled findings and recommendations and delivered a written paper and presentation to the client's office.

Undergraduate Consultant, The Education Trust,

University of Maryland, College Park; Washington, DC

2020

- Co-authored a state scan to analyze the effect and capacity of wraparound services to support the social, emotional, and academic development for low-income and minority students.
- Researched state programs, legislations, and student support funding structures.
- Collaborated in a team to produce weekly deliverables and a report to our client.
- Designed a PowerPoint presentation highlighting results and future recommendations of research.

Education

- University of Maryland, College Park
Master of Arts, Public Policy
Bachelor of Arts, Public Policy
Honors College, University Honors

Skills

- Stata Proficiency
- French Language Proficiency
- Microsoft Office Proficiency (Word, PowerPoint, Excel)
- Google Suite Proficiency

Anthony Garofano

Chief Creative Officer

agarofano@anlar.com

Experience

Chief Creative Officer, AnLar (Arlington, VA) 2014–Present

- Manages, sets standards and procedures for, and directly engages in all print and web-based publications, graphic and web design, writing and copyediting, and visual and conceptual branding. Develops verbal and visual style of client work. Supports a growing number of offices, programs, and initiatives of the U.S. Department of Education (ED), state departments of education, and higher education institutions
- Provides print publication services for several ED and state programs, including page layout, design, diagram and visual development, cover art design, and preparation for online and print dissemination
- Designs and maintains website user interface screens and functionality for several ED programs currently; develops supporting documentation including user guides and outreach materials
- Designs presentation and webinar slide deck templates and supports development of high-visibility products: design, layout, editing, content development, graphic design (diagrams, infographics, and other visual aids)
- Leads design and dissemination of outreach materials, including newsletters, flyers, signage, brochures, and other copy

Principal/Designer/Writer, Weave Media (Philadelphia, PA) 2012–2014

- Provided range of publications and communications support ED's Race to the Top program through the Reform Support Network (RSN)
- Provided graphic design and layout services for all RSN print publications, including page layout, cover design, diagram and visual development and preparation for online and print dissemination (all publications dating back to June 2013)
- Designed online RSN portal (Communities360°) user interface screens and functionality; developed supporting documentation including user guides and outreach materials
- Designed process documents and diagrams capturing key steps in internal product and service development processes (RSN publication development/review, technical assistance (TA) delivery, TA evaluation and continuous improvement, and monthly RSN newsletter development)
- Created set of internal and outreach document templates for use by RSN staff; and designed internal reference documents, including publication style guide

**Publications Team Lead, Quality Information Partners (QIP), Inc.
(Fairfax, VA)**

2006–2012

Led Products, Print, and Communication Team in support of several ED initiatives, and ED's National Center for Education Statistics (NCES), including:

- Statewide Longitudinal Data Systems (SLDS) Grant Program/Educational Data Technical Assistance Program (EDTAP): Served in the role of Publication & Resource Development Manager in support of the SLDS Grant Program via EDTAP, which provides states with a broad range of TA services related to P-20W (early learning through workforce) data system design, development, implementation, and use
- Common Education Data Standards (CEDS): Provided range of communications support across project, authoring and designing online and print products
- National Forum on Education Statistics: Supported management and best practice product development, working with leaders from state and local education agencies, the federal government, national organizations, and experts on education data issues
- State Education Information Support Services (SEISS): Designed conference booth display and flyer used for regional and national education conferences. Developed template and cover art for ED Facts newsletter
- Effective Practices Conferences: Designed logo. Developed and managed website to provide single point of access to information on all upcoming and past NCES data- related conferences, including session materials
- Privacy Technical Assistance Center: Provided editing and design services in support of publication and presentation development
- Common Core of Data (CCD): Authored and supported development of numerous publications; performed data quality control. Supported development of files and reports; prepared tables and graphs based on analyses
- National Education Data Model (NEDM): Provided technical quality assurance support for NEDM Version 2.0; rewrote final version of the Forum Guide to the Education Data Model: Version 1 (PK-12)
- NCES Handbooks Online: Supported content updates, review, and maintenance

Writer (contractor via QIP), Mizuni, Inc. (Dallas, TX)

2010–2011

Provided writing and editorial services across broad range of online and print publications and communications:

- Authored set of case studies ("Success Stories") on exemplary district clients
- Wrote, co-wrote, or edited all press releases from April 2010 through 2011
- Wrote and edited newsletter articles, brochures, flyers, conference display text, and advertisement copy

- Wrote technical user manual for Mizuni Zone Integration Server (ZIS) Solution
- Provided writing and editing support for general mail and email communications
- Co-authored company mission statement
- Authored and edited website content

**Research Assistant, Editorial Projects in Education Research,
Education Week Magazine (Bethesda, MD)**

2005–2006

Supported various projects, providing general writing, quality assurance, data entry, and table preparation support:

- Wrote policy summaries and prepared graphs for online *State Highlights Reports*
- Supported management of Education Counts state policy indicator database
- Collected graduation rate data from state education agencies for *State Highlights Reports*

Education

- American University
M.P.P., Public Policy
- Temple University
B.A., Anthropology & Psychology

Selected Publications

- Designer: What Works Clearinghouse, Institute of Education Sciences, U.S. Department of Education. (2020, November). *Supporting Postsecondary Success Intervention Report: Single Stop.*
- Designer: What Works Clearinghouse, Institute of Education Sciences, U.S. Department of Education. (2020, October). *Supporting Postsecondary Success Intervention Report: Success Boston Coaching.*
- Designer: What Works Clearinghouse, Institute of Education Sciences, U.S. Department of Education. (2020, September). *Postsecondary Career and Technical Education (CTE) Intervention Report: Integrated Basic Education Skills and Training (I-BEST).*
- Designer: What Works Clearinghouse, Institute of Education Sciences, U.S. Department of Education. (2020, January). *Supporting Postsecondary Success intervention report: Open Learning Initiative (OLI).*
- Designer: What Works Clearinghouse, Institute of Education Sciences, U.S. Department of Education. (2019, November). *Supporting Postsecondary Success intervention report: InsideTrack® Coaching.*
- Designer: What Works Clearinghouse, Institute of Education Sciences, U.S. Department of Education. (2019, October). *Supporting Postsecondary Success intervention report: Accelerated Study in Associate Programs.*

- Designer: National Center on Education Statistics, U.S. Department of Education. *Trends in Ratio of Pell Grant to Total Price of Attendance and Federal Loan Receipt* (NCES 2019- 489rev). Washington, DC: 2019.
- Designer: *Facilitating Long-term Improvements in Graduation and Higher Education for Tomorrow (FLIGHT)*, What Works Clearinghouse, U.S. Department of Education, Washington, DC: Forthcoming 2019.
- Designer: *The Arts in Education Program, Overview & Program Highlights*. Arts in Education Program, U.S. Department of Education, Washington, DC: 2016.
- Designer: *CIID's Generate Tool Infographic*. The Center for the Integration of IDEA Data, Washington, DC: 2016.
- Co-Designer: *Leading Change: The Emerging Human Capital Landscape in Personalized Learning Initiatives*. Race to the Top-District Program, U.S. Department of Education, Washington, DC: 2016.
- Co-Designer: *Grantee Communications Toolkit*. Race to the Top-District Program, U.S. Department of Education, Washington, DC: 2016.
- Designer: *Rapid Cycle Evaluation for Educators: A Primer on RCEs in the Race to the Top-District Program*. Race to the Top-District Program, U.S. Department of Education, Washington, DC: 2016.
- Designer & Author: *TA Center Collaboration is Catalyst to Propel Integration and Data Governance Efforts Forward*. Center for the Integration of IDEA Data, Washington, DC: 2016
- Designer & Editor: *The CIID Data Integration Toolkit (Overview)*. Center for the Integration of IDEA Data, U.S. Dept. of Education, Washington, DC: 2016.
- Designer & Editor: *Preschool Development and Expansion Grants Overview*. U.S. Department of Education, White House Early Learning Summit announcement, 2015.
- Designer & Editor: *Status of IDEA Data Integration Nationwide: Key Findings from the CIID Data Integration Assessment*. Center for the Integration of IDEA Data, U.S. Department of Education, Washington, DC: 2015.
- Designer: *Blended Learning Readiness and Progress Rubric*. Race to the Top-District, U.S. Department of Education, Washington, DC: 2015.
- Designer: *A Toolkit for Implementing High-Quality Student Learning Objectives 2.0*. U.S. Department of Education, Washington, DC: 2014
- Designer & Co-Author: *Education Enterprise Architecture Guidebook*. U.S. Department of Education, Washington, DC: 2014
- Designer: *Instructional Improvement Systems Planning and Implementation Guide*. U.S. Department of Education, Washington, DC: 2014
- Designer: *Strategies for Community Engagement in School Turnaround*. U.S. Department of Education, Washington, DC: 2014
- Designer: *Social Media Tip Sheets (series of four)*. U.S. Department of Education, Washington, DC: 2014
- Designer: *Educator Evaluation Communications Toolkit: Tools and Resources to Support States in Communicating About Educator Evaluation Systems*. U.S. Department of Education, Washington, DC: 2013.
- Designer: *Measurable Success, Growing Adoption, Vast Potential: Social Media Use Among State and Local Education Agencies*. U.S. Department of Education, Washington, DC: 2013.

- Designer: *From “Inform” to “Inspire”: A Framework for Communications and Engagement*. U.S. Department of Education, Washington, DC: 2013.
- Designer: *Measures of Learning: State Approaches for Gauging Student Growth in New Evaluation Systems*. U.S. Department of Education, Washington, DC: 2013.
- Designer: Education Reform Hub Monthly newsletter (All Issues, July 2013–Present)
- Author: *Traveling Through Time: Forum Guide to Longitudinal Data Systems Series, Books I- IV*. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2010-2011.
 - *Book IV: Advanced LDS Usage* (NFES 2011-802)
 - *Book III: Effectively Managing LDS Data* (NFES 2011-805)
 - *Book II: Planning and Developing an LDS* (NFES 2011-804)
 - *Book I: What is an LDS?* (NFES 2010-805)
- Designer: *Forum Guide to Supporting Data Access for Researchers: A State Education Agency Perspective*. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2012. (NFES 2012-809)
- Designer: *Forum Guide to Taking Action with Education Data*. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2012.
- Co-Author & Designer: “Anatomy of CEDS” and “Using CEDS.” Common Education Data Standards: 2012.
- Co-Author & Designer: *Stakeholder Engagement Plan Guide & Template*. State Support Team, Statewide Longitudinal Data Systems Grant Program: 2012. (Available to state education agencies upon request)
- Designer & Editor: *P-20W Data Governance Policy Guide & Template*. State Support Team, Statewide Longitudinal Data Systems Grant Program: 2012. (Available to state education agencies upon request)
- Designer & Editor: *P-20W Data Governance Manual Example*. State Support Team, Statewide Longitudinal Data Systems Grant Program: 2012. (Available to state education agencies upon request)
- Author & Designer: *Stakeholder Communications: SLDS Best Practices Brief*. Statewide Longitudinal Data Systems Grant Program: 2011.
- Author & Designer: “Shared Knowledge for Shared Success: The National Forum on Education Statistics” (brochure). U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2010. (NFES 2010-905)
- Author: “Success Story: Keller Independent School District” (case study). Mizuni, Inc.: 2011. Author: “Success Story: Western Heights Public Schools” (case study). Mizuni, Inc.: 2010.
- Consultant: *Every School Day Counts: The Forum Guide to Collecting and Using Attendance Data*. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2009. (NFES 2009-804)
- Co-Author: *Managing an Identity Crisis: Forum Guide to Implementing New Federal Race and Ethnicity Categories*. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2009. (NFES 2008-802)
- Co-Author: *Characteristics of the 100 Largest Public Elementary and*

Secondary School Districts in the United States: 2005–06. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2008. (NCES 2008-339)

- Co-Author: *Characteristics of the 100 Largest Public Elementary and Secondary School Districts in the United States: 2004–05*. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2008. (NCES 2008-335)
- Co-Author: *Public Elementary and Secondary School Student Enrollment, High School Completions, and Staff From the Common Core of Data: School Year 2005–06*. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2008. (NCES 2007-352)
- Co-Author: *Documentation to the NCES Common Core of Data Public Elementary/ Secondary School Universe Survey: School Year 2005–06*. U.S. Department of Education, National Center for Education Statistics, Washington, DC: 2007. (NCES 2007-365)

Selected Websites

- KIPP Teacher Resources Guide: <https://trg.kipp.org/>
Project Manager, Lead Designer
- Race to the Top – Reform Support Network (RSN) Communities 360°:
Lead Designer (2013–2015)
- RSN's Quality Information Toolkit for Student Learning Objectives:
Lead Designer (2013–2015)
- Race to the Top – Early Learning Challenge Communities360°:
Lead Designer (2013–2014)
- Office of Elementary and Secondary Education Communities360°:
Lead Designer (2014–2015)
- ED Facts Communities360°:
Lead Designer (2014–2015)
- Striving Readers Comprehensive Literacy Communities360°:
Lead Designer (2013–2015)
- Arts in Education Communities360°:
Lead Designer (2013–2015)
- Office of Special Education Programs Communities360°:
Lead Designer (2014–2015)
- AnLar LLC: <http://anlar.com>
Lead Designer (2013-Present)

Becki Stenger

Senior Designer

bstenger@anlar.com

Experience

Senior Designer, AnLar (Arlington, VA) 2015–Present

- Leads a range of communications design work for several federal and state initiatives, including the Preschool Development Grant program, the What Works Clearinghouse, Race to the Top–District, Center for the Integration of IDEA Data, the National Assessment Governing Board, Equitable Access Support Network, and others
- Designs and lays out print products, including the design and formatting of text, tables, diagrams, and other visuals
- Creates informative graphics, diagrams, infographics, custom icons, and other visuals to illustrate complex information and abstract concepts; creates custom designs for publication covers; performs photo editing
- Researches, plans, draws, and digitizes custom illustrations to enhance visual interest and convey ideas and information interestingly and playfully
- Assists in building and affirming brands by establishing unique logo design solutions, capturing varied aspects of the brand in a thoughtful manner
- Designs website interface graphics, layout, look and feel, and user experience
- Designs and develops newsletters, presentations, brochures, and various other outreach products to help our clients deliver information effectively
- Writes, copy edits, and conducts quality assurance on a range of print and web products

Principal/Photographer, Becki Stenger Photography (Baltimore, MD) 2010–Present

- Creates and updates branding for photography business, including logo suite, website design, and packaging for client’s final products
- Portrait and wedding photography for a range of clients in an array of environments
- Prepares images for print and web; design albums and books for clients

Designer/Manager, Matava Too (Baltimore, MD) 2007–2015

- Designed signage and emails to promote sales and events, leading graphic, typography, and color selection
- Photography and production of web-ready images for e-commerce site
- Delegated responsibilities to, and monitored the work of employees to ensure accomplishment of monthly sales goals

- Provided customer service and communicated with vendors to maintain and manage inventory

Education

- Stevenson University, (Stevenson, MD)
B.S., Visual Communication Design, *magna cum laude*

Branding

- Worked with the Preschool Development Grants Technical Assistance (PDG TA) Program to create a logo and branding materials reflective of the bright, fun preschool atmosphere but also of the seriousness of expanding high-quality early education to children in need. Created a website for the grant program that reinforces the visual elements of the brand and expanded the visual vocabulary for PDG TA to include photographs and icons in a specific style that enhances the overall brand message.
- Established a style guide to ensure all future products under the PDG TA brand will be written in the same voice, with the same cohesive aesthetic to tie the product to the brand.
- Generated the style guide for AnLar which included writing guides for each section in a specific tone reflective of all AnLar internal communications. Exploring tone, along with pushing the clean, modern aesthetic featured in the guide, has helped shape the brand personality and give life and a distinct presence to the AnLar brand.

Developed branding suite for personal photography business, which includes everything from the logo mark, to colors and typefaces used on marketing materials, to the physical packaging handed to clients. All of these items needed to be a reflection of me and the personality I prescribed my business.

Technical Skills

- Experienced and proficient in a variety of disciplines and media, including branding and logo design, typography and page layout, digital and analog photography, writing, and hand-lettering
- Very proficient in Adobe Photoshop, Illustrator, InDesign, and Lightroom
- Working knowledge of HTML and CSS, After Effects, Flash, and Final Cut Pro

Selected Publications

- Designer: [Using Technology to Support Postsecondary Student Learning](#).

What Works Clearinghouse. Washington, DC: 2019. Retrieved from:
<https://ies.ed.gov/ncee/wwc/PracticeGuide/25>

- Designer: [Vermont Family Engagement Toolkit and Self-Assessment](#). Vermont Agency of Education. Vermont: 2018. Retrieved from:
<https://education.vermont.gov/documents/edu-vermont-family-engagement-toolkit-and-self-assessment>
- Designer: [Vermont Early Learning Standards Family Resources](#). Vermont Agency of Education. Vermont: 2017. Retrieved from:
<https://vels.education.vermont.gov/resources-educators-and-families/family-resources>
- Designer: [Connecting the Dots: A Toolkit for Designing and Leading Equity Labs](#). U.S. Department of Education. Washington, DC: 2017. Retrieved from: <https://www2.ed.gov/about/offices/list/oese/oss/technicalassistance/easnequitylabtoolkit.pdf>
- Designer: [Innovations in Personalized Learning: A Conversation with Leading Districts](#). U.S. Department of Education. Washington, DC: 2016. Retrieved from:
<https://rttd.grads360.org/#communities/pdc/documents/12993>
- Designer: [Grantee Communications Toolkit](#). U.S. Department of Education. Washington, DC: 2016. Retrieved from:
<https://rttd.grads360.org/#communities/pdc/documents/12680>
- Designer: [Leading Change: The Emerging Human Capital Landscape in Personalized Learning Initiatives](#). U.S. Department of Education. Washington, DC: 2016. Retrieved from:
<https://rttd.grads360.org/#communities/pdc/documents/12595>
- Designer: [Talent Management Strategies: District Self-Assessment Checklist](#). U.S. Department of Education. Washington, DC: 2016. Retrieved from:
<https://easn.grads360.org/#communities/pdc/documents/12611>
- Designer: [Transforming the Culture of Teaching and Learning: Four Race to the Top– District Grantees’ Implementation of Personalized Learning](#). U.S. Department of Education. Washington, DC: 2016. Retrieved from:
<https://rttd.grads360.org/services/PDCService.svc/GetPDCDocumentFile?fileId=21503>
- Designer: [Suspension and Expulsion in Preschool Development States: Policies and Practices](#). Prepared for the Preschool Development Grant Technical Assistance Team. Washington, DC: 2016. Retrieved from:
<https://pdg.grads360.org/#communities/pdc/documents/12062>

- Designer: [Preschool Development Grants Program Brochure \(Yrs 1-2\)](https://pdg.grads360.org/#communities/pdc/documents/9897). U.S. Department of Education, Washington, DC: 2016. Retrieved from: <https://pdg.grads360.org/#communities/pdc/documents/9897>
- Designer: [State Plans to Ensure Equitable Access to Excellent Educators Implementation Tips Sheet #1: Setting Equity Goals](https://www2.ed.gov/about/offices/list/oese/oss/technicalassistance/easimplementationtipssheet1.pdf). U.S. Department of Education. Washington, DC: 2016. Retrieved from: <https://www2.ed.gov/about/offices/list/oese/oss/technicalassistance/easimplementationtipssheet1.pdf>
- Designer: [Project Based Learning at Harmony Public Schools](https://rttd.grads360.org/#communities/pdc/documents/8650). U.S. Department of Education, Washington, DC: 2015. Retrieved from: <https://rttd.grads360.org/#communities/pdc/documents/8650>
- Designer: [Getting Ahead Of The Curve: How Race to the Top-District Grantees Use Leading Indicators to Promote, Support & Sustain Personalized Learning](https://rttd.grads360.org/#communities/pdc/documents/7890). U.S. Department of Education, Washington, DC: 2015. Retrieved from: <https://rttd.grads360.org/#communities/pdc/documents/7890>
- Designer: [Getting to the Heart of the Matter: A Glimpse into How Carson City School District is Using Learning Targets to Personalize Learning](https://rttd.grads360.org/#communities/pdc/documents/7743). U.S. Department of Education, Washington, DC: 2015. Retrieved from: <https://rttd.grads360.org/#communities/pdc/documents/7743>

Tab 3 - References

Reference #1:

Client Name	Tennessee Department of Education (TDOE)
Contact Name and Title	Gary Smith, Former 619 Coordinator (TDOE). Current Director of Employment and Community First CHOICES, TennCare
Contact Address	710 James Robertson Parkway Nashville TN 37243-0375
Contact Telephone Number	615-906-0450
Email Address	Gary.A.Smith@tn.gov
Type of work provided to the client	Strategic Planning
Effective contract dates for the time frame services were/are being provided to client	July 1, 2021 - June 30, 2026

Reference #2:

Client Name	Texas Education Agency
Contact Name and Title	Cody Summerville, Executive Director of the Texas Association for the Education of Young Children (TXAEYC)
Contact Address	11149 Research Blvd # 260, Austin, TX 78759
Contact Telephone Number	830-613-7831
Email Address	cody@texasaeyc.org
Type of work provided to the client	Strategic Planning
Effective contract dates for the time frame services were/are being provided to client	May 29 - November 30, 2019

Reference #3:

Client Name	Franklin Special District
Contact Name and Title	Dr. Lee Kirkpatrick, Student Support Services Supervisor
Contact Address	205 Eddy Ln. Franklin, TN, 37064
Contact Telephone Number	615-591-2802
Email Address	kirkpatricklee@fssd.org
Type of work provided to the client	Strategic Planning
Effective contract dates for the time frame services were/are being provided to client	August 31, 2022 - present

Component 3 - Price

Tab 4 - Price/Budget

AnLar's proposed budget reflects the time and expertise necessary to develop the Final Strategic Plan, Performance Scorecard, Implementation Roadmap, Monitoring and Reporting Protocols, and all associated deliverables. The costs are fully burdened to include all direct and indirect expenses.

AnLar has created the following deliverables billing table based on the activities described in the Detailed Service Plan. We have included the deliverables requested by Mississippi in bold alongside additional deliverables necessary to achieve the desired final work products.

Line Item Deliverables Cost

Project Month	Key Activities	Associated Deliverable(s)	Deliverable Cost
Ongoing	Project Management Calls and Monthly Reports	Monthly Performance Reports (MPRs) and Project Management (PM) call notes	\$11,626.20 billed monthly at \$968.85 per month
Month 1	Project Kickoff Meeting	Kickoff meeting notes	\$8,045.07
	Stakeholder Mapping	Stakeholder Map	\$2,259.01
	Project Plan Development	Comprehensive Project Work Plan including Stakeholder Engagement Plan	\$1,897.54
	Stakeholder Engagement Planning		
Months 2 & 3	Review of Existing Documentation	SWOT Analysis and Environmental Scan Report	\$27,198.02
	Environmental Scan		
	Stakeholder Surveys and Interviews		
	SWOT Analysis		
	Mission and Vision Review with Project Leadership		
Month 4	Revisiting the Mission and Vision with Stakeholders	Mission and Vision	\$3,009.01
	Review SWOT Analysis	SWOT Analysis	\$5,060.10
	Goal Setting	Drafted Goals	\$2,259.01
	Strategy Brainstorming	Identified strategies to address goals	\$1,897.54
	Strategy Finalization with Project Leadership	Drafted Strategies	\$1,897.54

Project Month	Key Activities	Associated Deliverable(s)	Deliverable Cost
Month 5	KPI Identification	KPIs for each strategic goal	\$5,060.10
	Scorecard Design	Draft and Final Performance Scorecard	\$9,487.68
	Data Collection Mechanism Development	New and/or modified data collection tools	\$5,060.10
	Stakeholder Engagement Workshops	Summary of Stakeholder Feedback	\$8,725.12
Month 6	Draft Strategic Plan Incorporating Stakeholder Feedback	Draft Strategic Plan for review	\$5,928.59
	Review and Revision of the Strategic Plan (2 rounds)	Draft Strategic Plan with leadership feedback	\$2,530.05
	Final Strategic Plan	Final, professionally designed Strategic Plan by October 1, 2025	\$6,957.63
	Performance Scorecard Training Session	Training session and associated materials by October 1, 2025	\$3,162.56
	Presentation to the Board	Final presentation in person with accompanying slides by October 1, 2025	\$3,024.04
Month 7	Implementation Roadmap	Final Implementation Roadmap	\$3,795.07
Month 8	Monitoring and Reporting Mechanism	Monitoring and Reporting Plan with Protocols and Communications Plan	\$1,897.54
	Review and Adjustment Protocol	Finalized Review and Adjustment Protocol	\$5,060.10
Months 8-12	Ongoing Implementation Support	Notes from Implementation Planning Meetings	\$8,855.17
	Documentation Handover	All final documents, including plan, Performance Scorecard, implementation roadmap, and monitoring plan	\$1,012.02
Total Budget			\$135,704.80

Component 4 - Other

Tab 6 - Contingent Fee & Acknowledgement of Amendments

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

1/30/2025

Date

Ken Wagner

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Ken Wagner

Title: Chief Operating Officer

Signature:  Date: 1/30/2025



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6**: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

1/30/2025

Date

Ken Wagner

Printed Name



4040 N. Fairfax Drive, Suite 525
Arlington, Virginia 22203

Appendix A – Proposal Cover Sheet

Company/Name: The Boston Consulting Group, Inc.

Proposals must be submitted as directed in the *Proposal Submission Requirements* on or before the submission deadline specified in the solicitation.

Company Representative and Title	Kelsey Clark
Mailing Address	2501 N Harwood St Suite 2300
City, State, Zip	Dallas, TX 75201
Telephone:	██████████
E-Mail Address:	██████████

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? VND211663701
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: ██████████ Date: 2/5/2025



February 5, 2025

Proposal for State Board of Education Strategic Planning and Performance Scorecard

Mississippi Department of Education



The information contained in our response constitutes proprietary trade secrets or confidential commercial and financial information of BCG. Accordingly, pursuant to applicable laws and regulations, and based upon the exemptions from disclosure provided by the federal Freedom of Information Act and the exemptions provided under the Mississippi Public Records Act Miss. Code Ann. §§ 25-61-1 to 25-61-19, we hereby request that the Mississippi Department of Education afford confidential treatment to the information in this proposal. If any person should request an opportunity to inspect, copy or otherwise obtain disclosure or use of any part of such information, we request that we be immediately notified of any such request, be furnished with a copy of all written materials pertaining to such request (including but not limited to the request itself and any agency determinations with respect to such request), and be given advance notice of any intended release or disclosure.



February 5, 2025

Monique Corley
The Mississippi Department of Education, Office of Procurement
State Board of Education Strategic Planning and Performance Scorecard, RFX# 3120003047
359 North West Street
Jackson, Mississippi 39201

Dear Ms. Corley:

Please find attached a response from The Boston Consulting Group, Inc. (“BCG”) to RFX number 3120003047: Strategic Planning and Performance Scorecard. BCG is proud to propose on this effort and looks forward to bringing the Mississippi Department of Education (MDE) Office of the State Superintendent the best of our experience developing and implementing comprehensive strategic plans.

Founded in 1963, BCG is a global management consulting firm with **more than 60 years of experience** providing strategic consulting services. We have over [REDACTED] countries, operating as one firm worldwide. Our DNA is built on strategy, innovation, and complex large-scale change for the world’s leading corporate, government, multilateral, and non-profit organizations.

Our customized approaches draw on our heritage in strategy and combines deep insight into human dynamics with a strong understanding for what “works” based on our experience. We pride ourselves on our ability to work shoulder-to-shoulder with our clients to drive change and deliver lasting results. BCG’s excellence is demonstrated by the fact that our clients continue to work with us: [REDACTED] of our global business is from repeat customers. We approach each case with a fresh perspective. Our clients typically hire BCG when they have complex challenges or lofty aspirations that cannot be resolved with “cookie cutter” services, and they want their partner to tailor an approach that matches their unique context and **work across an array of stakeholders in a highly collaborative fashion** on important strategic questions.

As is outlined throughout this response, we will leverage our deep experience in education and strategic planning to support MDE on this strategy revamp. BCG offers a unique combination of experience and executional certainty, shown through differentiators in our approach that position us as an ideal partner:

- **We have experience working with and are committed to Mississippi and its neighboring states.** BCG has a commitment to supporting clients across the South, supporting public and private sector clients alike. Recently, and most significantly, BCG partnered with the [REDACTED]
- **Our expertise and experience in the education field are unmatched.** Our experience includes successful partnerships with states (e.g., [REDACTED]) as well as engagements with families and community-based providers to deeply understand their needs and build cross-sector coalitions at the local level (e.g., [REDACTED]). BCG has done

extensive work in driving change in K-12 agencies and state education systems through large scale transformation efforts with [REDACTED] projects completed in early childhood education and K-12 over the last 5 years. We understand the challenges school districts face and will leverage our expertise and prior experience to maximize both impact and efficiency.

- **We go beyond top-down benchmarks, working with organizations to understand how agencies and initiatives work.** Our work with many state governments over the last year means that we understand best practices from elsewhere, but our approach is to thoughtfully tailor our recommendations to the needs of Mississippi. We don't use a standardized approach but rather engage agencies to understand contexts, challenges, and ideas to design customized recommendations.
- **We have a heritage in organizational design and strategy, governance and change management.** BCG is externally ranked #1 among all consulting firms for both organizational change management (by ALM Vanguard industry rankings), as well as strategy and implementation thought leadership (by Source for Consulting independent rankings).
- **We build capabilities to help sustain improvements.** From the outset, we will focus on ensuring all key Mississippi stakeholders are appropriately engaged to ensure broad buy in to the strategic direction, while also adopting a practical approach to implementation. This ensures your teams know where to start and can move forward efficiently.
- **We are an industry leader in integrity and living our values, ensuring our work will generate a strategic plan that achieves high level of service delivery to all Mississippians.** These values form the basis for the work we do and our diverse talent, cultures, and perspectives. Our values drive both those we hire and the projects we choose, which together have resulted in our reputation as an industry leader in integrity, ethics, and values-led consulting. We seek to continually improve, motivate, upskill, and bring joy to work.

In this effort, you will be supported by a dedicated team led by Kelsey Clark:

Contact Name: Kelsey Clark, Managing Director and Partner

Email: [REDACTED]

Mailing Address: BCG Dallas, 2501 N Harwood St., Suite 2200, Dallas, TX 75201

We would be delighted to support you in this important effort and welcome the opportunity to discuss further. Evidence of BCG's good standing with the State of Mississippi's Code Annotated § 79-4-15.01 is in progress and can be provided upon award of contract. We also acknowledge and agree to securing a performance bond for 100% of the contract amount should BCG be awarded.

Thank you for your consideration and please do not hesitate to contact us with questions or feedback.

Sincerely,

[REDACTED]
Kelsey Clark
Managing Director
and Partner, BCG

Lina Bankert
Managing Director
and Partner, BCG

Scott St Marie
Managing Director
and Partner, BCG

Proposal – Table of Contents

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 - Tab 5 – Additional information..... 27
 - Tab 6 – Signed Contingent Fee/ Acknowledgement of Amendments..... 32

Mapping of Information requested in this RFP to sections in the response

INFORMATION REQUESTED IN RFP	RESPONSE OR SECTION TO REFERENCE IN THIS DOCUMENT
Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to <u>transact business</u> in Mississippi	Evidence of BCG’s good standing with the State of Mississippi’s Code Annotated § 79-4-15.01 is in progress and can be provided upon award of contract
Total number of years in business and the company’s experience related to the scope of work	BCG has completed more than [REDACTED] education and workforce projects since 2005 and supported on more than [REDACTED] state and local public sector efforts in the past 5 years. See Component 2 for more detail
The age of the Offeror’s business and average number of employees for the past five (5) years	BCG was founded in 1963 and averages [REDACTED]
Principals, parent organizations, and subsidiary organizations in their proposal or qualification. Principals shall include founder, investors, owner, co-owners, CEO, Chief, all executive level employees	BCG is a privately held, Massachusetts corporation and is wholly owned by its 2,000+ member partnership; no single partner owns more than 1% of its interests. Christoph Schweizer has served as CEO since October 2021. Executive Committee can be found at the link https://www.bcg.com/about/people-culture/leadership
Evidence of 5 years’ experience in strategic planning and performance management with other educational organizations	BCG has completed more than [REDACTED] education and workforce projects since 2005 and supported on more than [REDACTED] state and local public sector efforts in the past 5 years. See Component 2 for more detail
The abilities, qualifications, and experiences of all persons who would be assigned to provide required services	The Leadership Team that would support this effort consists of some of BCG’s foremost experts in education strategy. Their detailed bios can be found in Tab 2 – Resumes for Key Personnel.
Detailed plan describing how the scope of services will be planned, implemented, achieved, and the reports provided that will give the MDE the support and results required to verify services were accomplished and complete	Detailed workplan can be found in Component 1.
Demonstrated ability to engage and collaborate with a wide array of stakeholders	We have deep experience in complex stakeholder management within the local education context. See Component 2 for more detail
Ability to research and analyze data to determine trends and to establish a performance tracking system	All our work includes thoughtful analysis of our client’s historical data as well as industry trends. We are committed to providing high-quality benchmarks to bring insights on best-in-class practices and establish robust systems to measure performance. Examples of our work are found in Tab 5 – Additional Information
Agreement – Service performance in United States and locations outside the State of Mississippi in which you propose to provide the services described in this solicitation	Project dedicated staff will be located within US offices and all services provided will be conducted within US offices. Personnel located in offices in Texas, Illinois, and California. See Tab 2 for more detail
Equal opportunity policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws.	BCG is an Equal Opportunity Employer and has acknowledged this expectation in Appendix F.

MANDATORY COMPLIANCE REQUIREMENTS	SECTION TO REFERENCE IN THIS DOCUMENT
1. Proposal received by submission deadline	Submitted on 02/05/2025
2. Required proposal submission format followed	Confirmed
3. Minimum qualifications met	See responses above
4. Proposal Cover Sheet (Appendix A)	Pg 1
5. Production/ Detailed Service Plan	Tab 1 – Pg 8
6. Resumes for Key Personnel	Tab 2 – Pg 18
7. References (Appendix C)	Tab 3 – Pg 24
8. Cost Data (Appendix I)	Component 3 – Pg 26
9. All required signed forms	Tab 6 – Pg 32



Component 1 - Plan of Action

Tab 1 - Production/ Detailed Service Plan

Our Understanding and Experience

From our understanding, you seek a partner in the development of a comprehensive strategic plan for Mississippi's State Board of Education. In addition to a strategic redesign, there is a need to establish a clear roadmap that allows the Mississippi Department of Education (MDE) to track progress towards its stated goals. Team BCG has **over 60 years of experience** working with public and private sector partners to design custom strategies that meet the unique needs and context of our clients, and we have **worked with education partners since 2005**.

Trends in educational progress have been improving in Mississippi over the past decade, with an increased proportion of students meeting proficiency. The state has improved its overall national ranking from 50th to 35th, demonstrating success of intentional strategic efforts. The state was the most improved in the nation in both fourth grade math and reading and saw significant gains amongst eighth graders. There have been significant rebounds from pre-pandemic trends, with all-time high achievements on the Mississippi Academic Assessment Program (MAAP) for Math, ELA, and Science. Many of the outcomes set forth in the 6-point strategic plan established in 2021 have seen great progress.

However, there are still achievement gaps, with many Mississippians falling below the national average. The average per pupil spending is well below the national average, ranked 46th in the nation. This investment gap has negative impacts on all students, but outsized impacts amongst certain populations including Black and Hispanic children, which make up over half (~47% and ~5%, respectively) of the



~437k student population. Despite Black students making up half of the K-12 student population, White students are twice as likely to be enrolled in Advanced Placement (AP) courses.

With the expiration of ESSER COVID-19 relief funds, Mississippi will need to think critically about how to support districts facing budget cuts and further necessitates the need for strategic planning. With approximately one-quarter (~26%) of Mississippi’s children falling below the poverty line, these students are more likely to have lower achievement rates and attend schools with fewer resources. Equitable resource allocation and targeted strategies to improve the success of all Mississippians will be critical.

Like many states, Mississippi is also facing a critical teaching shortage. With a lack of qualified teachers, particularly in high-needs subject areas and geographies, there is a need to strengthen the educator pipeline and wraparound supports for teachers. Ensuring competitive pay, reasonable class sizes, and teacher autonomy are just a few of the ways to improve retention which has a direct impact on student achievement.

BCG has helped address these challenges with a variety of partners across the nation. Our work with school systems and private foundations to address teacher shortages, with large school districts to improve early literacy, and states to address equitable educational outcomes position us as a strong partner for MDE’s next strategic planning development. Below we have outlined our approach to this type of project and the scope of work we believe will deliver on these opportunities based on our extensive experience working with similar institutions and agencies.

Our Approach to Project Management

[Redacted content]

[Redacted content]

[Redacted content]

[REDACTED]

[REDACTED]

[REDACTED]

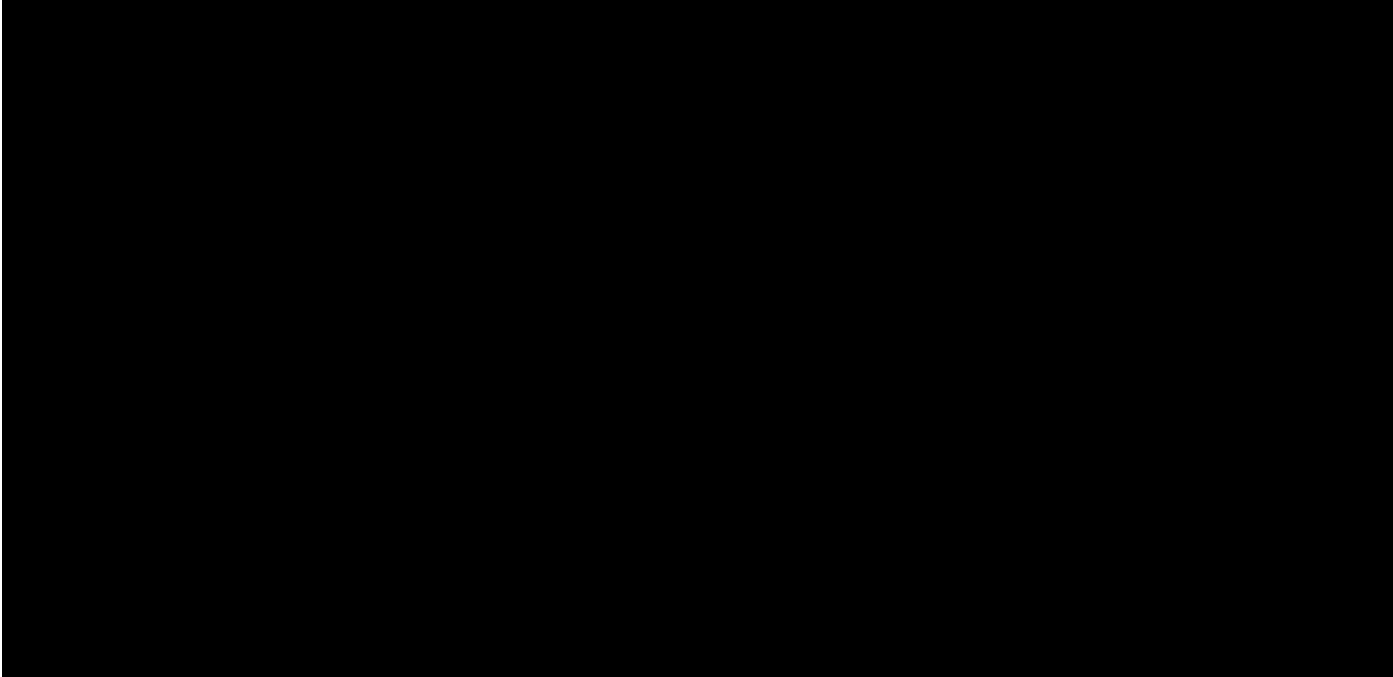
Plan of Action and Deliverables

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



[Redacted text line]

[Redacted text block]

[Redacted text line]

[Redacted text block]

[Redacted text line]

[Redacted text block]

Phase 1.1: Laying the Groundwork (3 Months)

[Redacted text block]

[Redacted text block]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Phase 1.1 Deliverables:

[REDACTED]

[REDACTED]

Phase 1.2: Developing the Strategy (3 Months)

[REDACTED]

Phase 1.2 Deliverables:

- | [REDACTED]
 - | [REDACTED]
 - | [REDACTED]
- | [REDACTED]
 - | [REDACTED]
- | [REDACTED]
 - | [REDACTED]

Phase 2: Supporting Implementation (6 Months)

- [REDACTED]
- [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]

[Redacted]

Phase 2 Deliverables:

[Redacted]

Implementation

[Redacted]

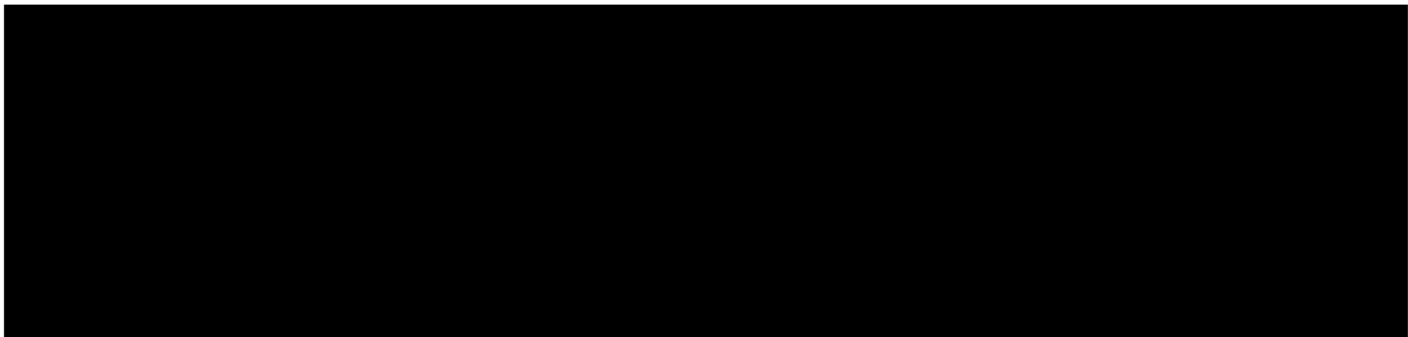
Expected Outcomes/ Results

[Redacted]



Component 2 – Administration

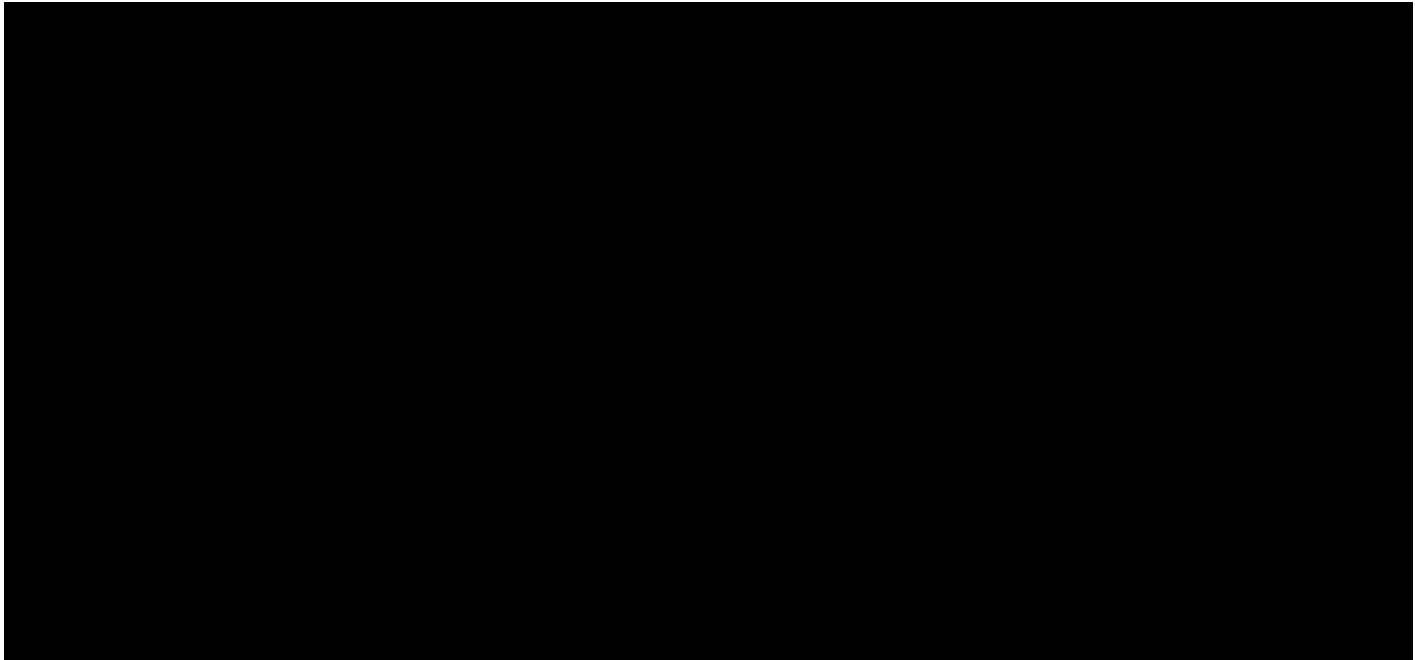
BCG is a privately held, Massachusetts corporation (200 Pier Four Blvd., Boston, MA 02210) with offices in more than [REDACTED], and operates as one firm, worldwide. The Corporation is wholly owned by its 2000+ member partnership, of which no one partner owns more than 1% of its interests. Christoph Schweizer is the Chief Executive Officer and supports Managing Directors and Partners across 20 practice areas, including Public Sector work.



BCG has decades of experience on similar projects. We have extensive expertise working with states and other organizations in the PK-20 space, have completed more than [REDACTED] education and workforce projects since 2005, and have supported on more than [REDACTED] state and local public sector efforts in the past 5 years. Our purpose as an organization is to “unlock the potential of those who advance the world,” which we do by supporting thousands of organizations on their most complex and difficult strategic and operational challenges.

Our Education, Employment, and Welfare (EEW) practice is focused on transforming education systems by supporting our clients across strategy, data, and performance management; technology and innovation; collaborative implementation; and more, with an underlying mission to drive significant social impact by dramatically improving education and educational outcomes for students. In the last five years, we have completed over [REDACTED] EEW projects, served public and private sector clients across the full value chain from early childhood to reskilling, and authored 60+ education-related publications. Our experience in the K-12 sector has been spent at the forefront of major education trends, including partnerships across public and private sectors, integrating technology to boost learning and improve student advising, and implementation of SaaS and cloud-based models in EdTech, among many others.

We work throughout education sub-sectors with a particular focus on early learning and primary and secondary education. Our early childhood and PK-12 work has covered a broad footprint and we have supported engagements across the spectrum of major education trends for early learning (e.g., expanded access to and equality of early childhood education, using the latest evidence-based practices to increase literacy rates) and primary and secondary education (e.g., devising data-driven approaches to identify and serve at-risk students, measuring and supporting quality improvements in large public systems).



We also have deep experience in complex stakeholder management within the local education context. For example, we worked with [REDACTED]

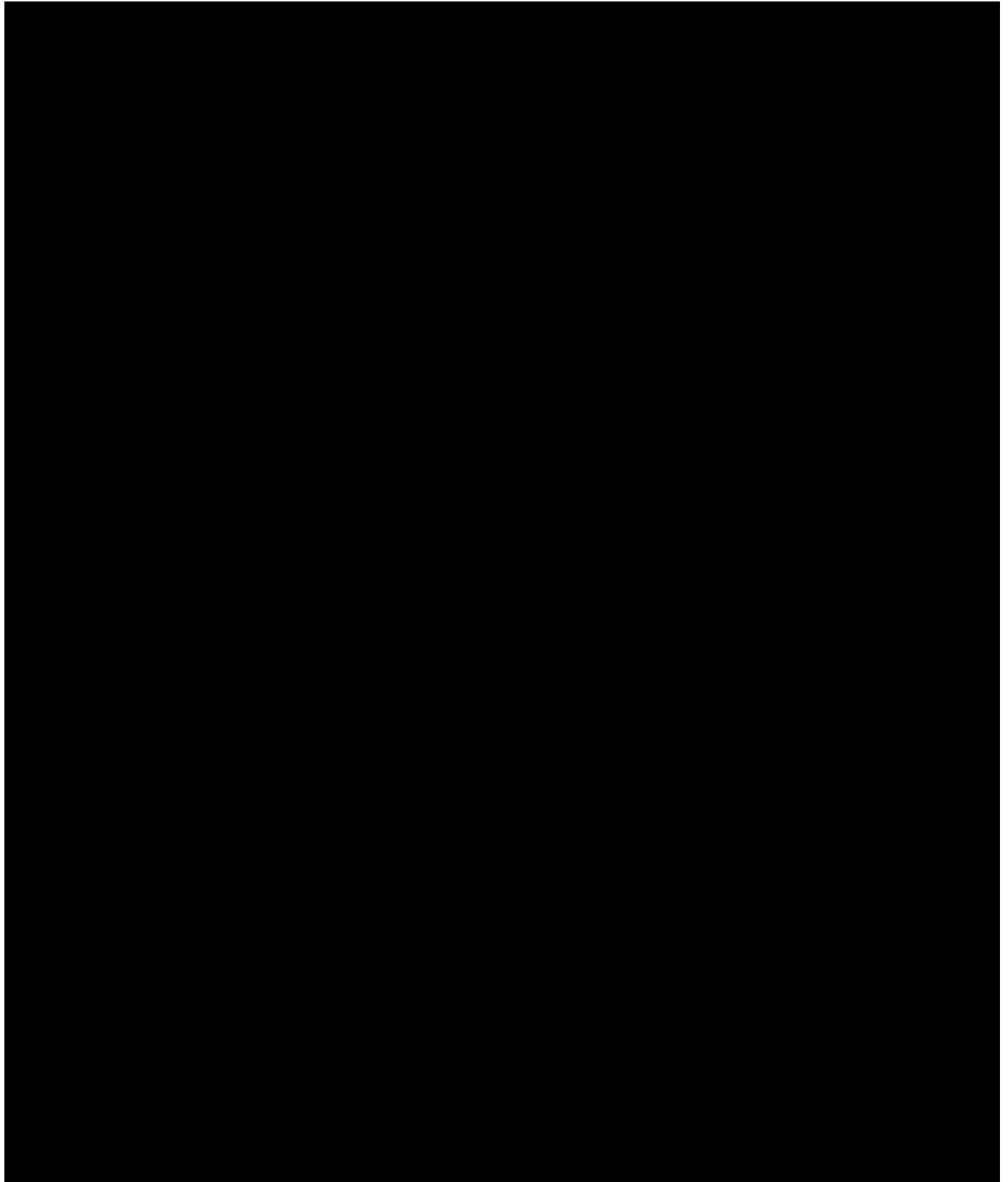


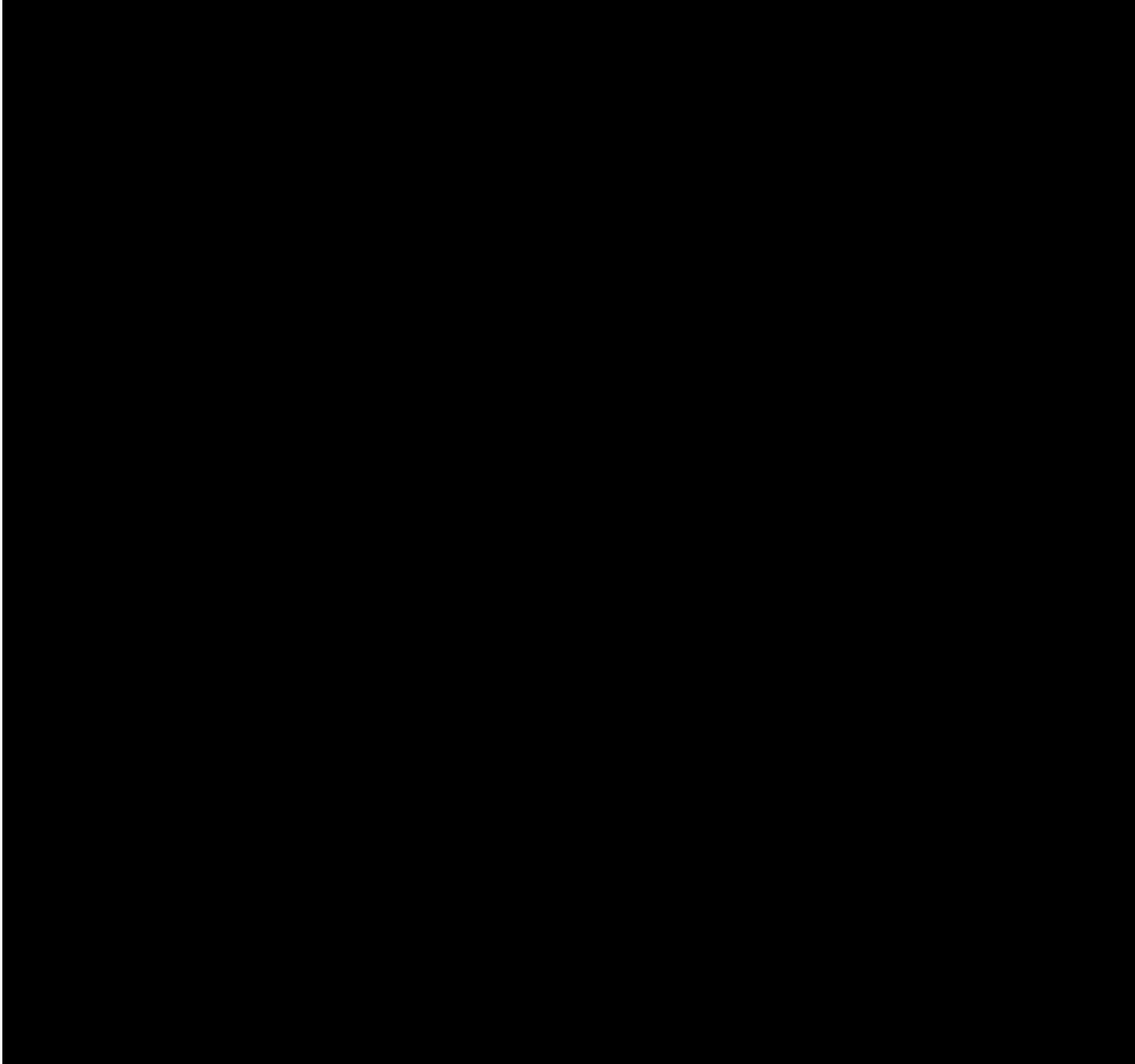
Tab 2 - Resumes for Key Personnel

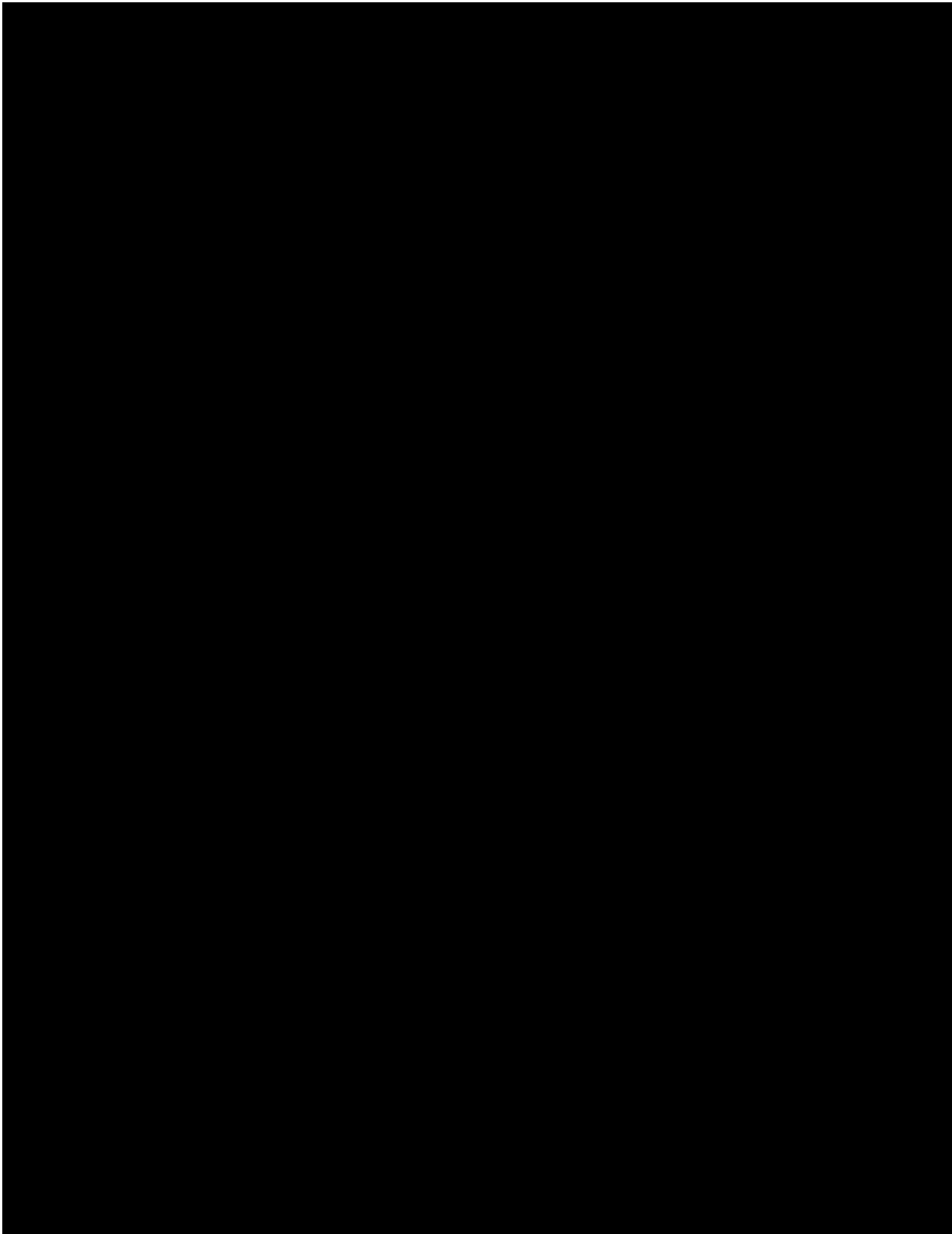
Team BCG’s leadership will provide coordination and guidance to deliver a unified approach for the work. They will oversee the project team and manage when and how to pull in diverse expertise from our combined network. Our leadership team is intimately familiar with education systems, working with state governments and mandates, as well as the broader education ecosystem.

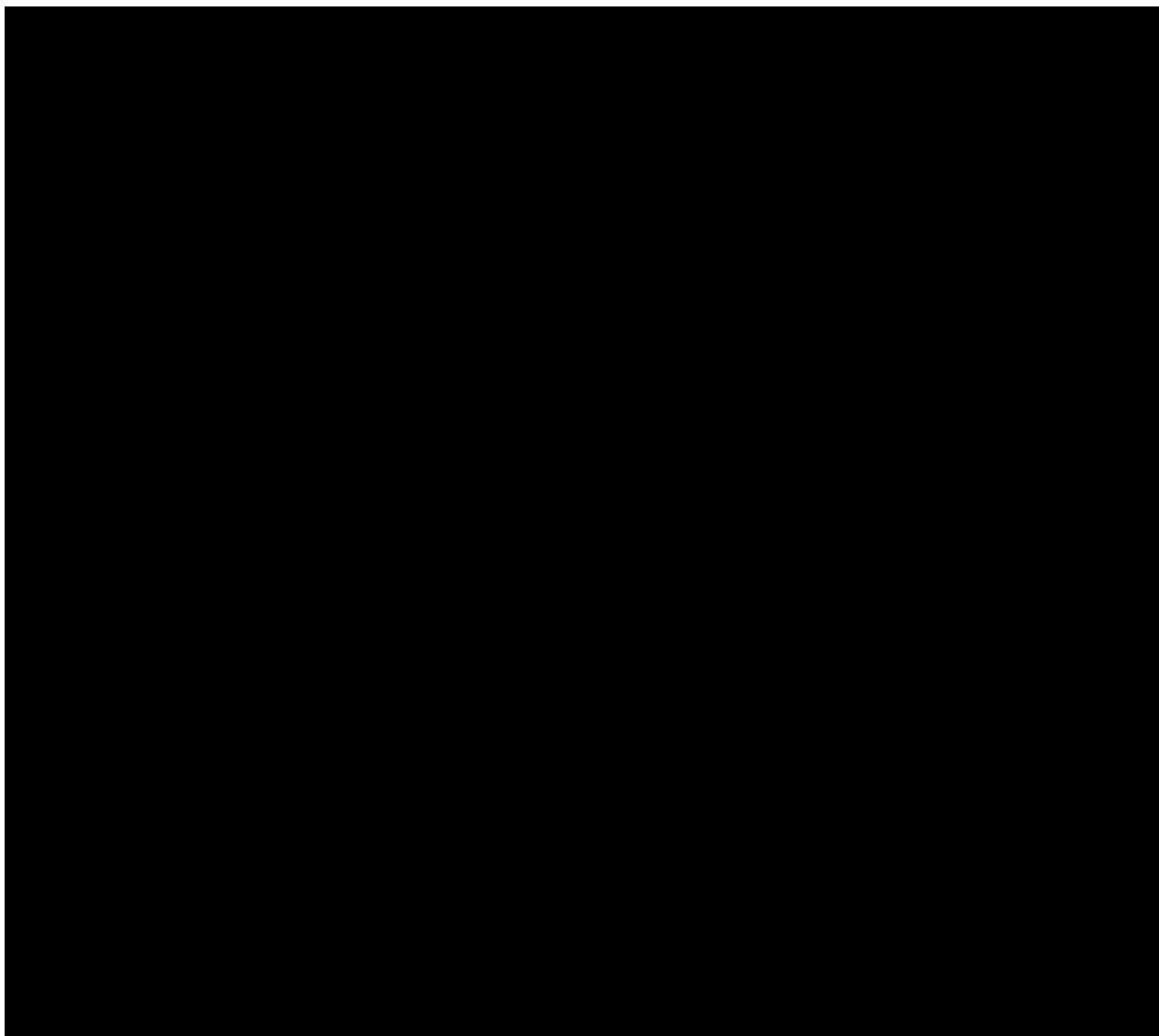
BCG employs a consulting model developed and refined over the years with two key differentiators: 1) Our model has a dedicated core team of project managers and consultants, assigned full-time and not split across multiple clients; and 2) our senior leadership is deeply involved in the execution of projects, providing hands-on leadership, content and analysis review, and ongoing engagement. We acknowledge and agree to the requirement that all services related to this contract will be provided from offices within the United States.

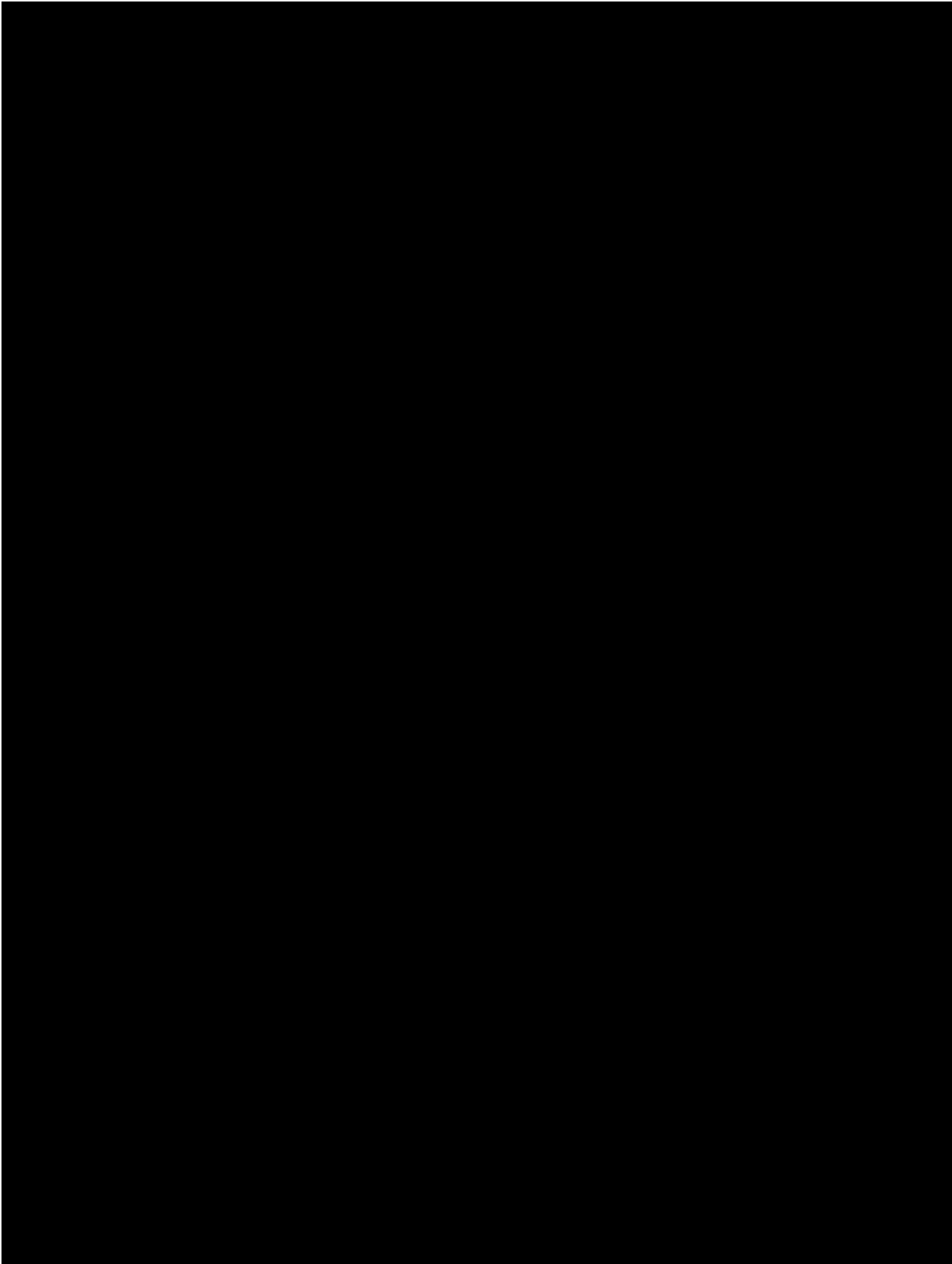
Project Leadership | Our most senior leaders will guide the overall direction of the project and help prioritize efforts throughout. They will identify and raise key decision points to the Mississippi State Board of Education and project leadership team. The case leadership on this project will be comprised of:

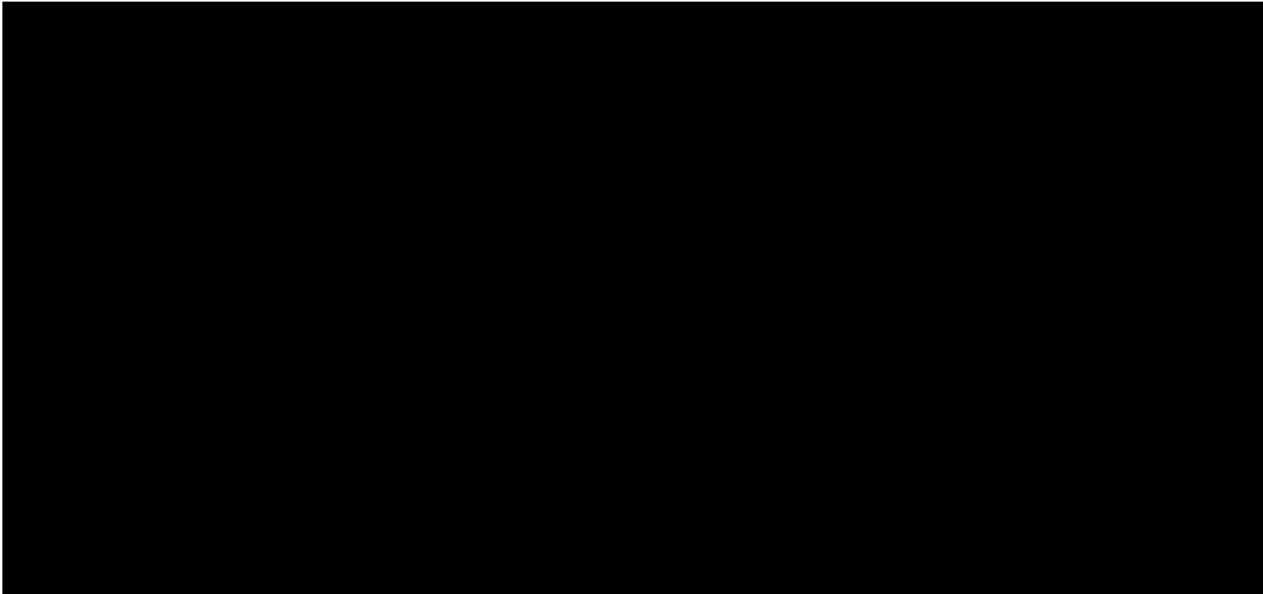












Tab 3 - References

We have a track record of success working with states on educational initiatives. Our team has partnered with states in multiyear collaborations that have led to the transformation of education and our local-level work has included building and supporting place-based multi-sector coalitions, navigating complex relationships to deliver outcomes.

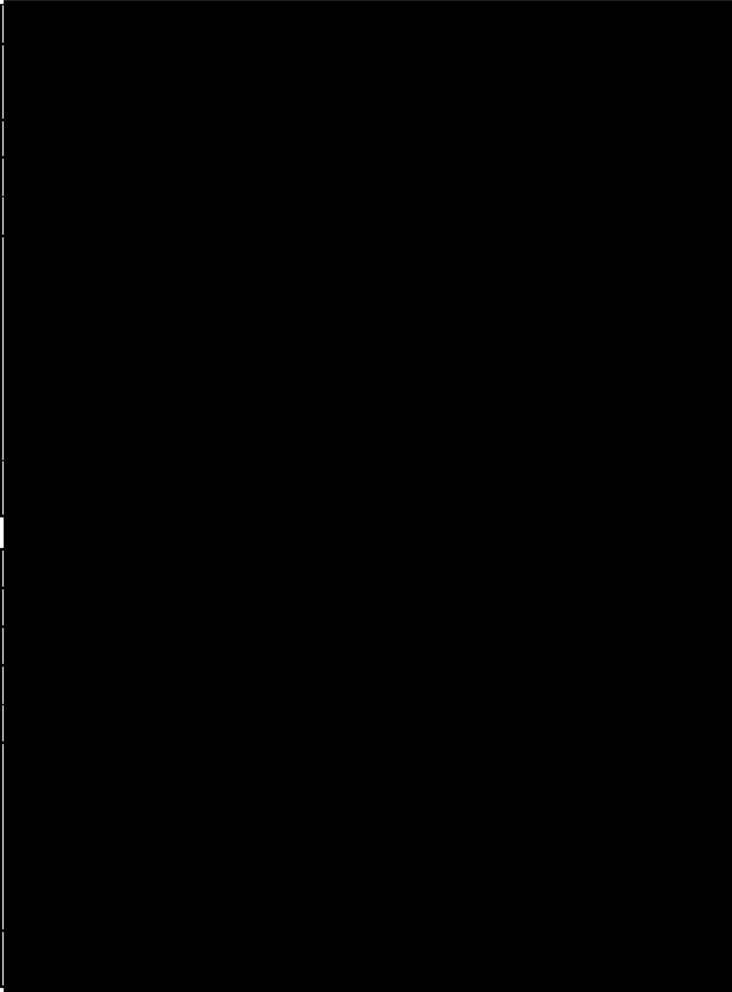
References to some of our past partners can be found below; in addition, we have included select project vignettes in Tab 5 – Additional Information.

CLIENT NAME	[REDACTED]
CONTACT NAME AND TITLE	
CONTACT ADDRESS	
CONTACT TELEPHONE NUMBER	
EMAIL ADDRESS	
TYPE OF WORK PROVIDED TO THE CLIENT	
EFFECTIVE CONTRACT DATES FOR THE TIME FRAME SERVICES WERE/ ARE BEING PROVIDED TO CLIENT	

Letter of reference in Tab 5 – Additional Information.

CLIENT NAME
CONTACT NAME AND TITLE
CONTACT ADDRESS
CONTACT TELEPHONE NUMBER
EMAIL ADDRESS
TYPE OF WORK PROVIDED TO THE CLIENT
EFFECTIVE CONTRACT DATES FOR THE TIME FRAME SERVICES WERE/ ARE BEING PROVIDED TO CLIENT

CLIENT NAME
CONTACT NAME AND TITLE
CONTACT ADDRESS
CONTACT TELEPHONE NUMBER
EMAIL ADDRESS
TYPE OF WORK PROVIDED TO THE CLIENT
EFFECTIVE CONTRACT DATES FOR THE TIME FRAME SERVICES WERE/ ARE BEING PROVIDED TO CLIENT





Component 3 - Price

Tab 4 - Price/ Budget

The typical fees for and value of this work is [REDACTED]. Because this effort has the potential to impact the broad student population across Mississippi, including students from low-income households, this effort is eligible for a BCG co-investment from our Social Impact practice area, bringing total client fees to \$1.99M.

The breakdown of price by deliverable is outlined below:

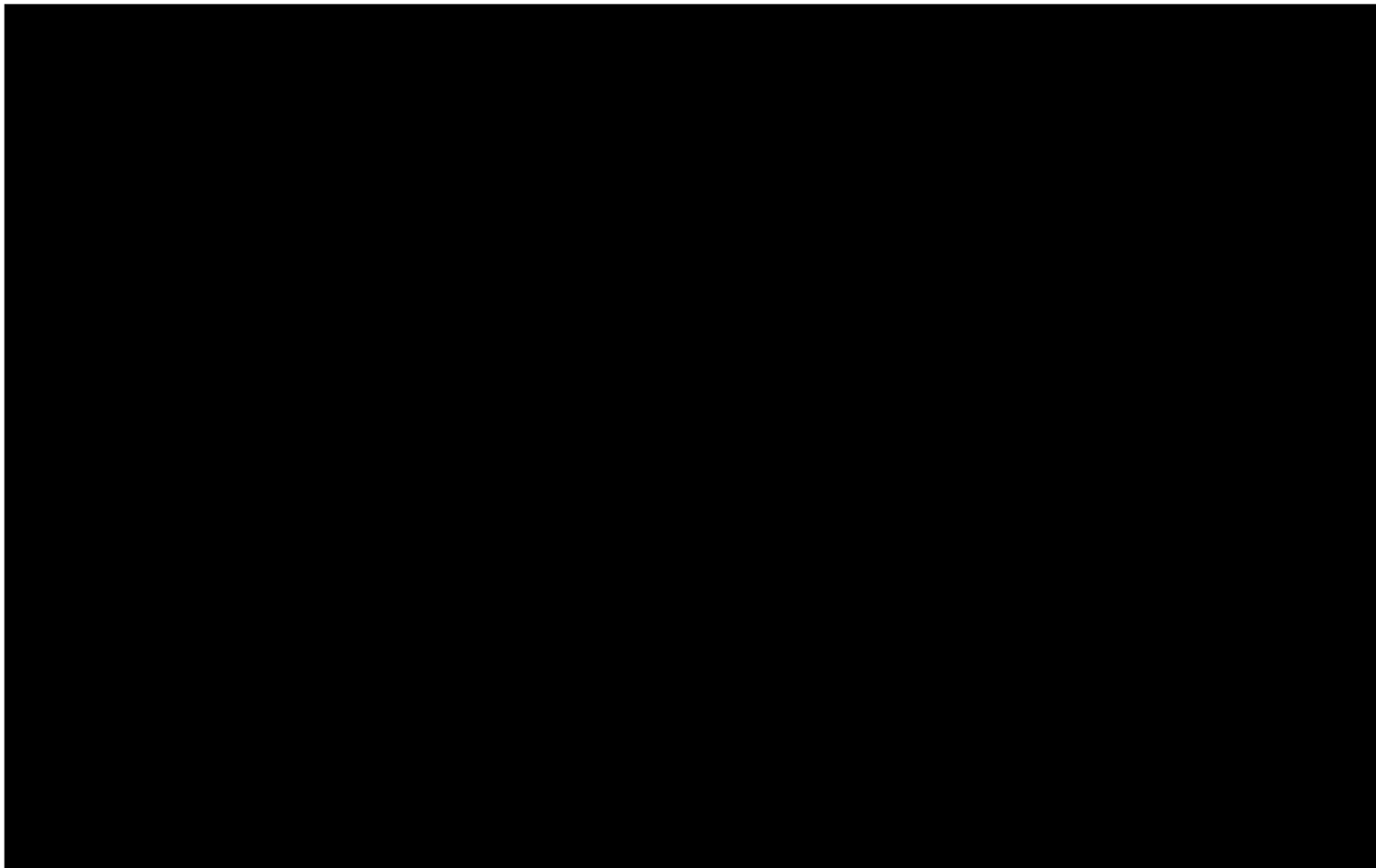
Project Work Plan	[REDACTED]
SWOT Analysis and Environmental Scan Report	[REDACTED]
Stakeholder Engagement Plan	[REDACTED]
Draft Strategic Plan and Performance Scorecard	[REDACTED]
Final Strategic Plan and Performance Scorecard	[REDACTED]
Final Presentation and Training by August 1	[REDACTED]
Implementation Roadmap	[REDACTED]
Monitoring and Reporting Protocols	[REDACTED]
Total	\$ 1,991,500

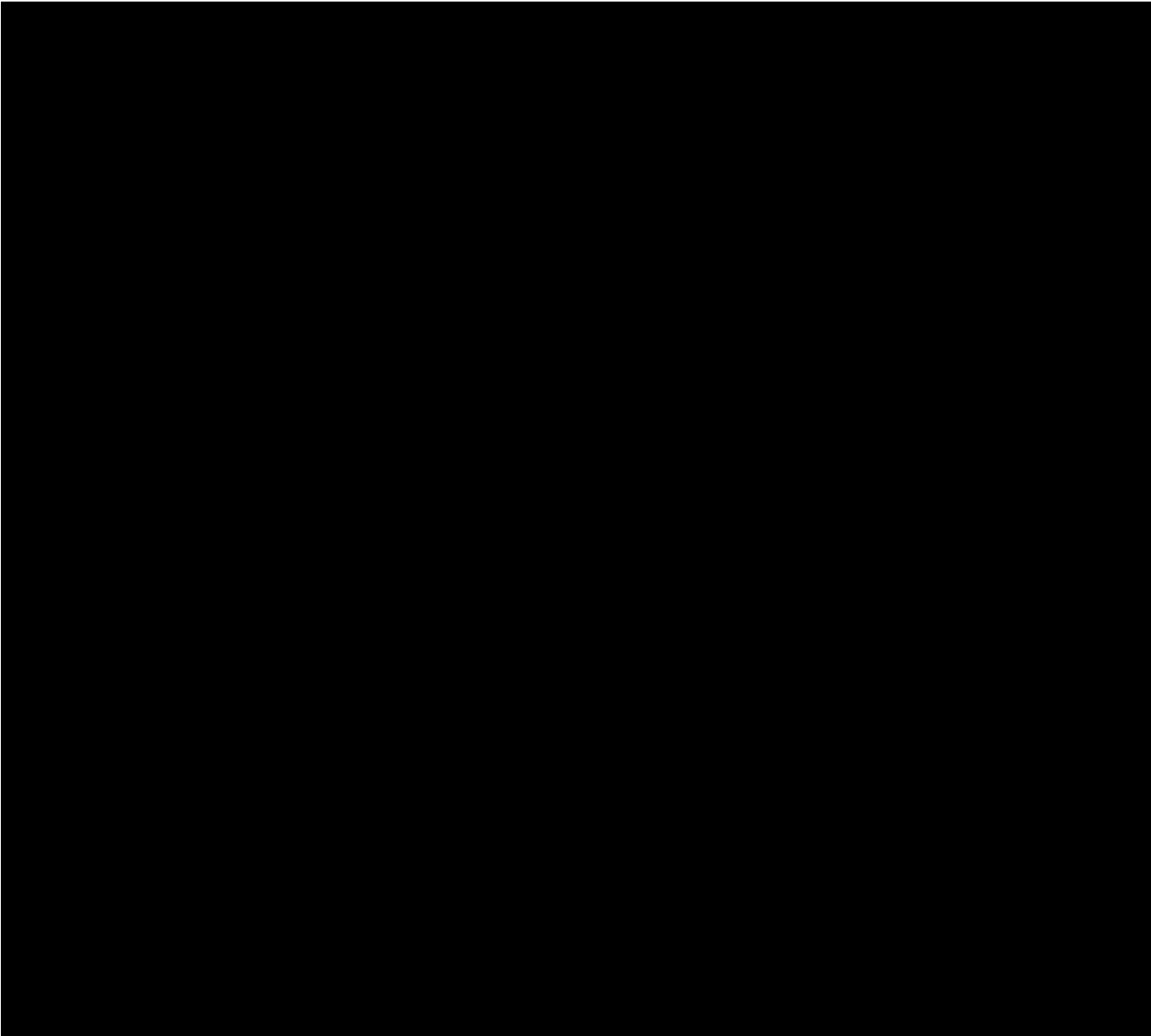


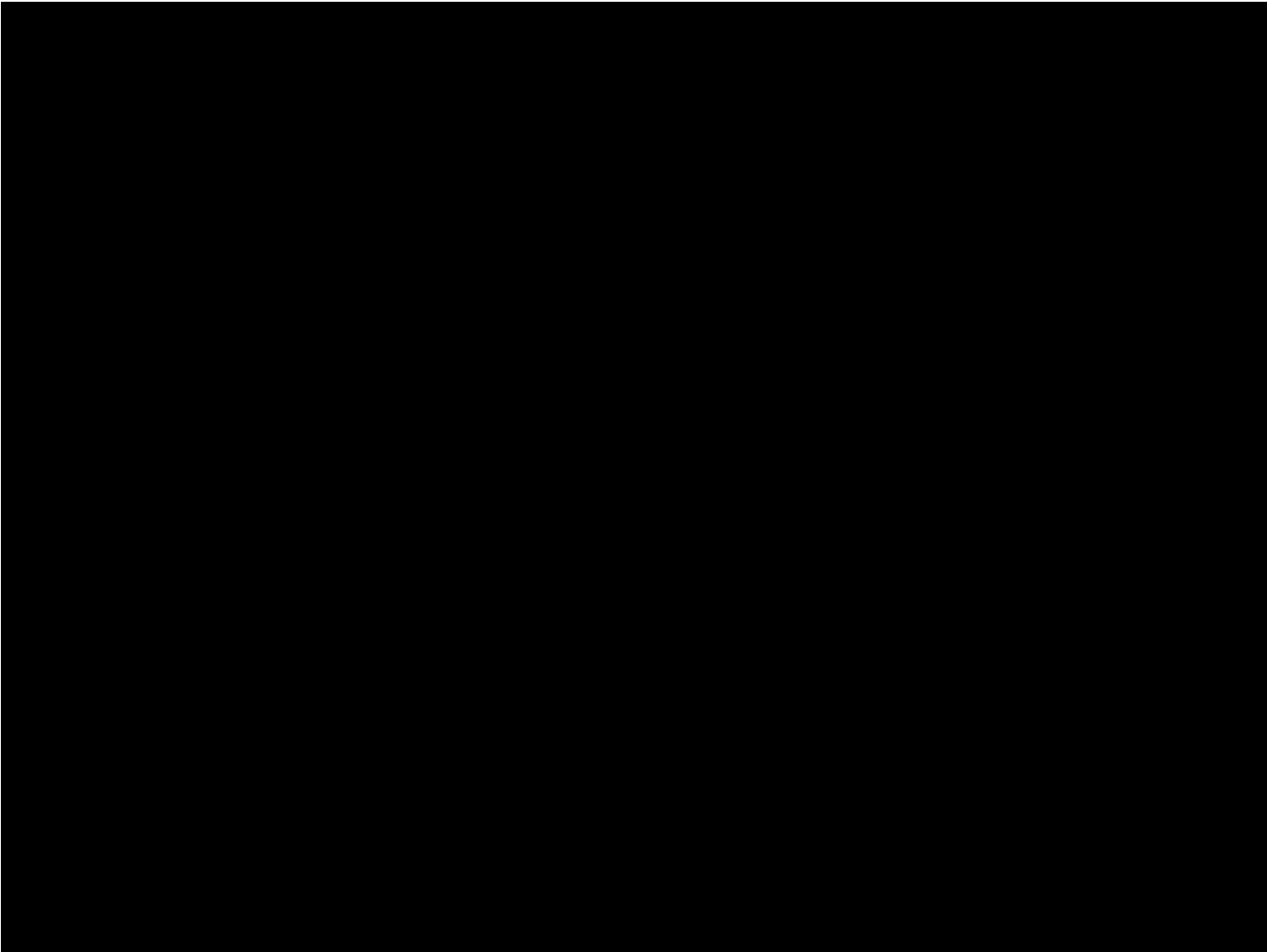
Component 4 – Other

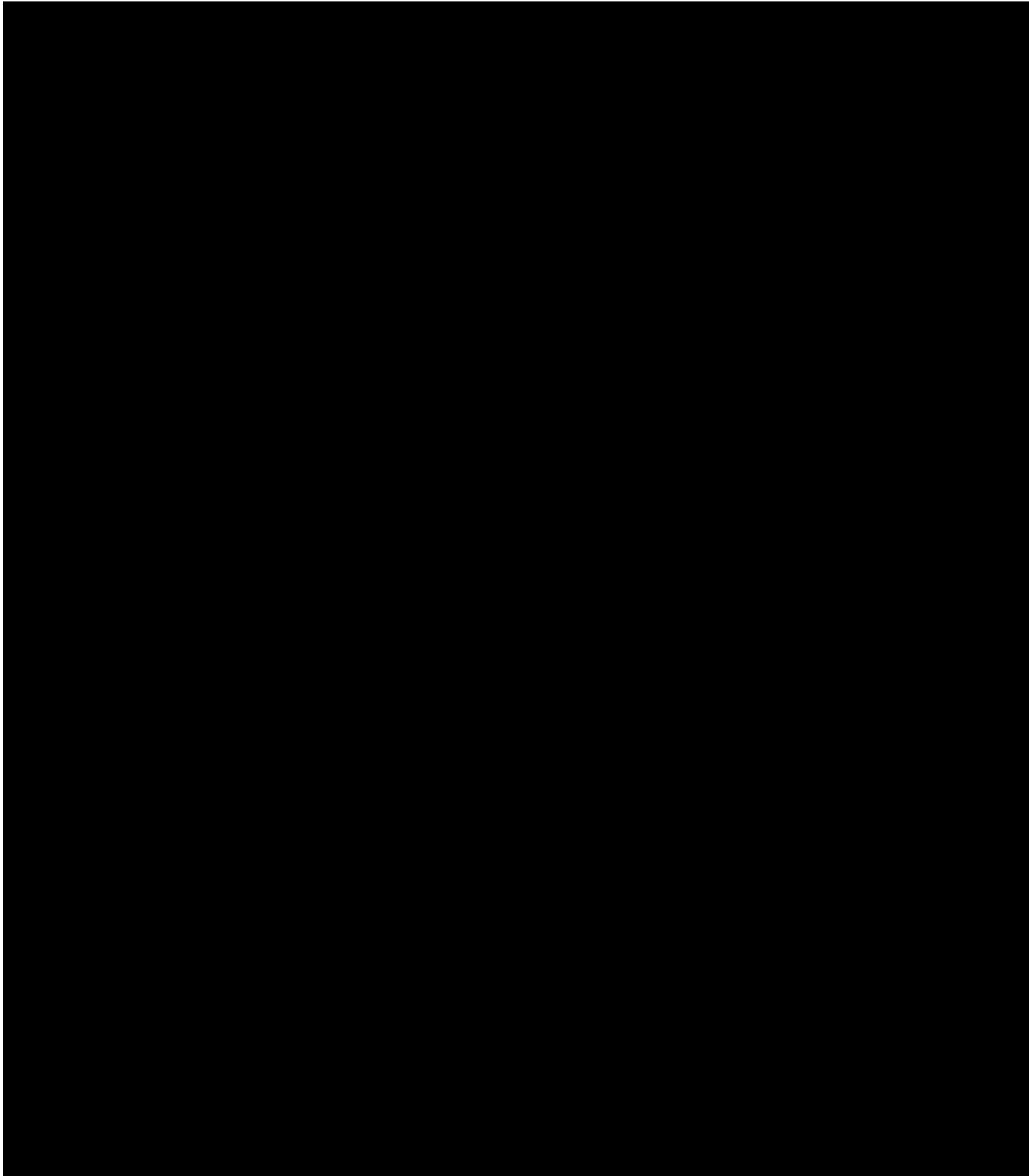
Tab 5 – Additional information

Detailed project examples

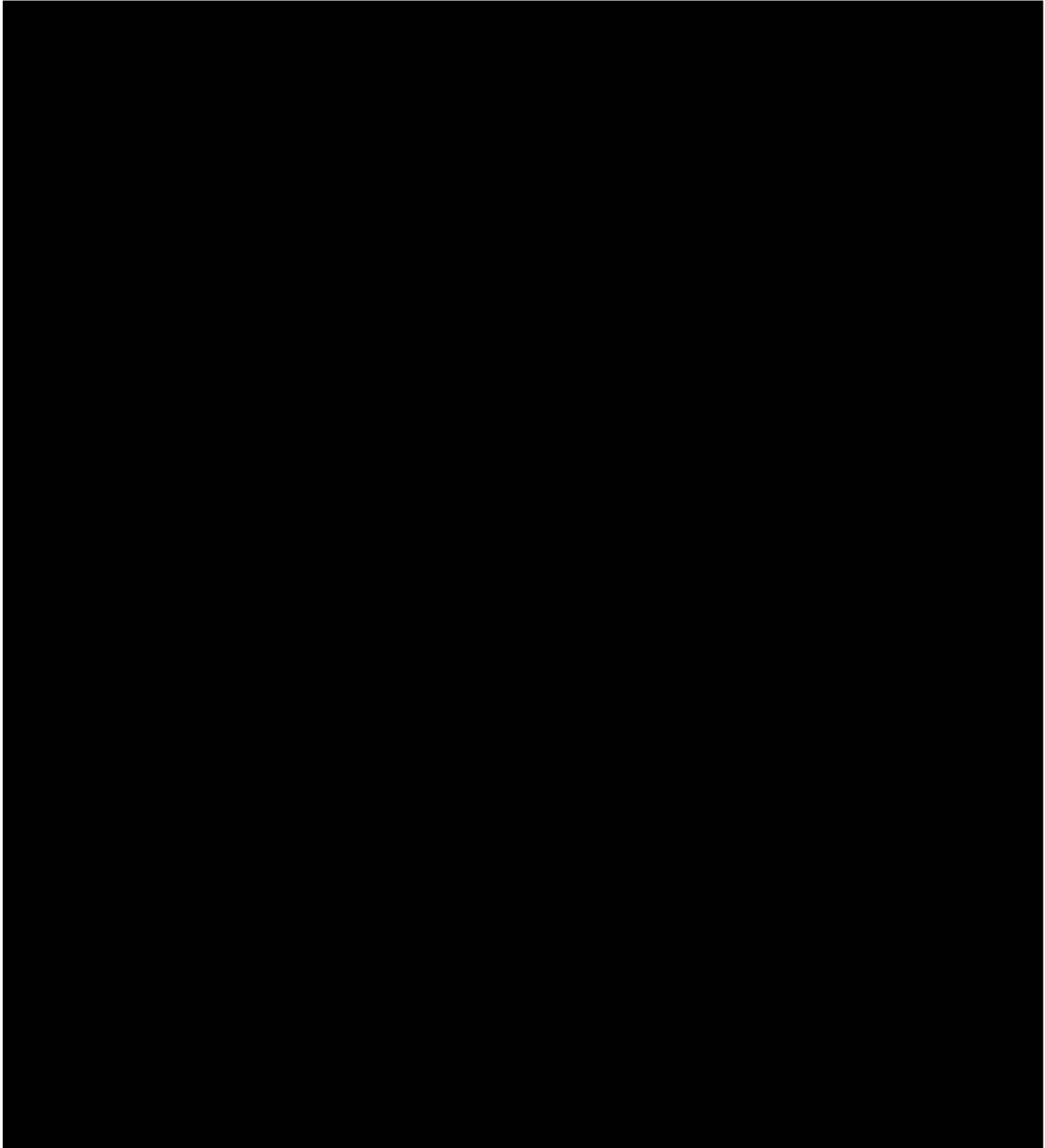








Letter of Reference



Tab 6 – Signed Contingent Fee/ Acknowledgement of Amendments

Revised October 10, 2024
Page 4 of 4

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdekt2.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

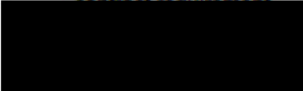
Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract amendment.


Authorized Signature

2/5/2025
Date

Kelsey Clark
Printed Name

*Request for Proposal (RFX No. 3120003047)
Strategic Planning and Performance Scorecard
Amendment Number One*

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

[Redacted Signature]

Authorized Signature

2/5/2025

Date

Kelsey Clark

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror’s proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

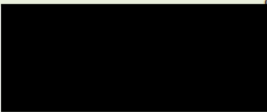
CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation ).

Name: Kelsey Clark

Title: Managing Director and Partner

Date: 2/5/2025

Modifications or additions to any portion of this document may be cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors shall acknowledge which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor's current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror's proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Appendix A – Proposal Cover Sheet

Company/Name: Education First Consulting, LLC

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Carl Christopher, Chief Finance & Revenue Officer
Mailing Address	PO Box 22871
City, State, Zip	Seattle, WA 98122
Telephone:	213.359.7988
E-Mail Address:	cchristopher@education-first.com

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? 3102134693
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: Carl Christopher Date: 05/02/25



Proposal to Support

Mississippi State Board of Education Strategic Planning and Performance Scorecard

RFX 3120003047

Prepared for:

Mississippi Department of Education

Prepared by:

Anissa Listak, Principal Consultant
773.308.6333
alistak@education-first.com

Ann Duffy, Principal Consultant
770.315.6253
aduffy@education-first.com

Education First

Proposal issued:

February 5, 2025



Component 1: Plan of Action

Tab 1: Production/Detailed Service Plan

Minimum Qualifications

Education First Consulting, LLC is a national, mission-driven education strategy and policy organization with unique and deep expertise in education improvement honed since our founding in 2006. We are pleased to submit this response to Mississippi Department of Education (MDE) RFX 3120003047 to facilitate the development of a strategic plan and performance scorecard for the Mississippi State Board of Education. Mississippi has distinguished itself for dramatically improving student achievement statewide over the last decade, becoming a national exemplar and maintaining robust gains even in the face of major disruptors like the COVID-19 pandemic. We are eager to support the state in continuing to build on this strong momentum.

Over nearly two decades, Education First has supported dozens of strategic planning projects in partnership with state education agencies, non-profit organizations, philanthropy, school districts and institutions of higher education. We have a proven track record for facilitating small and large stakeholder groups, ensuring each key constituency is considered and included. Each engagement results in actionable plans and clear roadmaps for implementation. Our past clients include:

- **Arkansas Division of Elementary and Secondary Education.** With the Office of Educator Effectiveness and Licensure at the Department of Elementary & Secondary Education, we produced 1) the Arkansas State Review Guide, which articulates the state's vision for educator preparation reviews, 2) an Educator Workforce Strategic Plan tailored to the state's context and needs, and 3) an implementation plan to accompany the new strategy. We are now supporting DESE in executing the plan.
- **California Labor and Workforce Development Agency.** Since 2022, we have partnered with the Labor and Workforce Development Agency and the Division of Apprenticeship Standards to lead a statewide effort to develop registered apprenticeships in teaching. Our role has included facilitating a multi-year working group of senior leaders at state agencies, synthesizing relevant research, designing and launching a pilot strategy, and developing a toolkit for launching, scaling and sustaining a system of registered apprenticeships in teaching across California.
- **Colorado Department of Education.** We facilitated a year-long, 26-member task force of stakeholders charged with studying academic opportunities, inequities and promising practices in Colorado schools and with recommending improvements to the state's accountability and accreditation system. We designed a mix of in-person and hybrid monthly meetings to support task force members in studying key challenges and reaching consensus on recommendations for system improvements. We facilitated extensive stakeholder engagement, leveraged national experts and worked with CDE to ensure the Task Force members had the data necessary to make decisions. Finally, we authored interim and final reports to the Colorado legislature presenting the task force's recommendations, which were shared with the education committees of the Colorado House of Representatives and Senate, the Governor, the Colorado Board of Education, the Commissioner of Education and CDE.
- **Georgia Department of Education.** Since 2022, we have provided served as a Region 5 Comprehensive Center technical assistance partner, providing capacity-building services to state educational agencies in the region and serving as the state liaison to the Georgia Department of Education. In Georgia, we currently support strategic initiatives targeting educator shortages, educator evaluation and internal cross-agency services to districts.

- **Illinois State Board of Education.** We facilitated the development of the Illinois State Board of Education's (ISBE) 2022-23 strategic plan through a process that included engagement with the state's school management alliance, teacher unions and advocacy organizations; community town hall meetings; and a statewide survey. With ISBE, we navigated the onset of the COVID-19 pandemic during the planning process and pivoted to heavily revise the plan to address emerging needs.
- **Indiana Department of Education.** We worked with Superintendent Jennifer McCormick and her cabinet to develop the Indiana Department of Education's 2017-2022 strategic plan and implementation roadmap, informed by input from educator focus groups and a steering committee.
- **Missouri Department of Elementary and Secondary Education.** We conducted desk research, interviews and focus groups, a survey of candidates and early career teachers, and quantitative data analysis to generate six recommendations for the state to strengthen the teacher pipeline. We also provided technical assistance to DESE as they began implementing the recommendations.

In addition, Education First recently began working with the **Indiana Department of Education**, the **Montana Department of Education** and the **Nebraska Department of Education** to implement multiple projects to develop and expand the use of through-year assessments.

Please refer to Tab 2 for more information on our seasoned team, Tab 3 for client references for three of the projects listed above, and Tab 5 for samples of strategic plans and reports we have produced for state agencies.

Approach & Methodology

Education First offers a tailored approach to each engagement, and our proposed scope of work for MDE is no different. Our methodology ensures our deliverables will be unique to the distinct strengths, weaknesses, opportunities, and challenges of the Mississippi landscape.

We excel in designing coherent strategies that account for the needs and reflect the input of the full range of stakeholders whose buy-in and support will be required for the strategy's success. With our firm's broad and deep expertise that spans academic strategy and HQIM, assessment and accountability system design, educator recruitment and retention, postsecondary pathways and organizational effectiveness, we are well-positioned to co-design a holistic plan that addresses the full range of education needs MDE seeks to address.

Our experienced team will partner closely with MDE staff and stakeholders throughout each phase, fostering a collaborative, transparent and trust-based relationship. From establishing a shared vision of success to conducting regular check-ins and interactive work sessions, we will engage MDE deeply in exploring research findings and their strategic implications. We commit to ensuring that our project approach and methodology align seamlessly with MDE's goals and values, driving meaningful and sustainable outcomes. On the following pages, we describe the vision for our partnership and an outline of how we will accomplish the work in collaboration with the MDE.

Implementation, Deliverables and Expected Outcomes

Phase 1: Project Initiation and Planning (April 2025 | 4 Weeks)

We will launch the project with an in-person kick-off meeting and work session in which we will identify key MDE staff and Board members to participate as members of a Strategic Planning Committee. This committee will be responsible for guiding the strategic planning process from start to finish, supporting the high-quality engagement of other stakeholders and serving as the primary point of contact for Education First.

During this meeting, we will reaffirm the approved scope of work to ensure all stakeholders understand project objectives; determine our norms for working together, including routines for communication and collaboration, and workshop a draft timeline for each phase of the project; and identify and document key internal and external stakeholders to engage throughout the planning process. As an outcome of this meeting, Education First will develop a detailed project workplan.

Activities/Deliverables

- Project kickoff and work session 1 (in person)
- Detailed project work plan
- Identification and documentation of key stakeholders

Phase 2: Environmental Scan and Data Collection (May - June 2025 | 8 Weeks)

We will conduct research to support MDE in understanding the internal and external factors that may impact its strategy development and decision-making. This phase will incorporate a mixed-methods approach, including stakeholder interviews, a survey and document review.

We will begin this phase by developing a detailed research plan in collaboration with the MDE project team to identify key research questions, sources and analysis methods, as well as a stakeholder engagement plan that articulates who will give input on the plan, in what capacity, how and when. These complementary plans will ensure our team gathers the information MDE needs to:

- **Understand the broader landscape.** We will analyze key trends, challenges and opportunities that could shape MDE's work, both within and outside the state, ensuring the strategy reflects the realities of the external environment.
- **Use data to drive decisions.** We will rely on evidence and data to inform strategic priorities and guide resource allocation, ensuring decisions are grounded in the practical needs of MDE stakeholders.
- **Align strategy with capacity.** We will consider MDE's internal strengths and external conditions to ensure the agency's mission, vision and goals are ambitious and achievable.
- **Anticipate risks and opportunities.** By identifying potential challenges and areas for growth early on, we'll help MDE stay ahead of changes rather than react to them.
- **Engage stakeholders for buy-in.** We will bring together diverse voices to ensure that key stakeholders understand, support and contribute to MDE's strategic direction.

Activities/Deliverables

- Work session 2 (virtual)
- Detailed research plan and supporting tools
- Stakeholder engagement plan
- Document review
- Stakeholder interviews, focus groups and survey
- Environmental scan and report
- SWOT analysis and report

- **Sharpen strategic focus.** We will help MDE prioritize what matters most, ensuring time and resources are directed toward high-impact initiatives.

MDE engages with a broad range of stakeholders, including those directly involved in education policy, implementation and advocacy. To ensure a comprehensive scan and provide MDE with diverse perspectives, Education First will engage with multiple stakeholders, including, but not limited to:

- **MDE staff** from various departments, e.g., Early Childhood Education, Academic Education, Career and Technical Education, Educator Licensure and Talent Acquisition
- **The Office of Governor Tate Reeves**
- **Mississippi House and Senate Education Committees**
- **State and national partners** working closely with MDE, e.g., MS Association of School Administrators, MS Administration of School Superintendents, institutions of higher learning
- **School district and charter school network leaders**, including Mississippi First
- **MS Teacher Advisory Council, Principal Advisory Council and Early Childhood Advisory Council**
- **Teacher preparation programs**, e.g., Mississippi Teacher Residency Program, University of Mississippi, Mississippi State University
- **Student, parent and community organizations**, e.g., MS Parent Teacher Association, the MS Parent Teacher Student Association.

In consultation with MDE, Education First will make every effort to leverage existing structures (e.g., standing meetings of the agency’s advisory councils, summer conferences for state associations, etc.) to maximize efficiency, prevent duplication and ensure a broad representation of voices. If feasible, we anticipate conducting a portion of our interviews and focus groups through an in-person trip coinciding with a summer conference or other event, while the remaining engagement will be conducted virtually.

Once we have completed our data collection and analysis, we will produce a detailed environmental scan and SWOT analysis report and convene the Strategic Planning Committee in a virtual working session to review and respond to our findings. This will position MDE to craft an ambitious strategic plan and develop the performance scorecard.

Phase 3: Strategy Development (July 2025 | 4 Weeks)

Education First will facilitate the Strategic Planning Committee through a series of work sessions to develop the key components of the strategic plan, leveraging the environmental scan and SWOT analysis. During this phase, we will focus on the following:

- **Mission and vision alignment.** We will facilitate a structured discussion to assess how well MDE’s mission and vision reflect its evolving priorities. We will use a targeted alignment exercise to identify strengths, gaps and areas for potential refinement. The outcome will be a new or revised mission and vision statement that reflects MDE’s priorities for the next five years.

Activities/Deliverables

- Strategic Plan Committee Work Sessions
Sample cadence:
 - + Work Session 3: Vision, mission and values (virtual)
 - + Work Session 4: Priorities, goals and strategies (in person)
 - + Work Session 5: Strategy mapping and action planning (virtual)
- Draft strategy elements

- **Priority-setting.** We will guide MDE in identifying and validating strategic priorities based on Phase 2 findings. We will utilize an affinity mapping exercise to categorize key themes from the data, engage the Strategic Planning Committee to prioritize the themes and establish guiding principles to ensure coherence and feasibility. The outcome will be a focused set of priority areas that guide goal-setting.
- **Goals development.** Once priority areas are identified, Education First and MDE will develop clear, measurable strategic goals. We will utilize the SMART goal framework and facilitate breakout sessions to refine goal language and feasibility. We will use a dynamic, hands-on facilitation style that supports the Strategic Planning Committee in developing and finalizing a structured set of strategic goals categorized by timeline.
- **Strategy mapping and action planning.** Here, Education First and MDE will develop a strategic roadmap that links identified goals to key actions and milestones, including considerations for engaging staff and managing the changes associated with each strategy component. We will also begin to articulate KPIs for the performance scorecard, which is the focus of Phase 4. The outcome is a draft strategic roadmap with timelines and accountability measures.

Although the cadence for these strategic work sessions will be determined in partnership with MDE, we anticipate a mix of virtual and in-person meetings, including one in-depth, full-day working session facilitated in person. We will develop participant agendas, detailed facilitation plans and supporting materials for each session. Following each session, we will codify key decisions into draft elements of the strategic plan.

Phase 4: Performance Scorecard Development (August 2025 | 4 Weeks)

Education First and the Strategic Planning Committee will identify Key Performance Indicators (KPIs) for each strategic goal and develop a visual scorecard that allows MDE and other key stakeholders to track progress toward the state's strategic goals. We will:

- **Conduct due diligence:** We will interview members of MDE's Public Reporting team and other staff responsible for tracking and reporting on data relevant to the draft strategy to understand current processes, mechanisms, roles and responsibilities for performance reporting. These interviews will give us insight into what data are currently available and what shifts and resources may be required to implement a new performance scorecard.
- **Develop KPIs:** Grounded in MDE's refreshed vision, mission and values, Education First and the Strategic Planning Committee will establish measurable KPIs, metrics and targets aligned with each strategic goal through a virtual working session in which Committee members work in small groups to identify leading (predictive) and lagging (outcome-based) indicators for each goal.
- **Prepare for data collection:** We will share the draft KPIs and metrics with key MDE staff and conduct additional virtual meetings with them as needed to align on a plan for collecting, storing and tracking data for each indicator. We will identify existing data sources and gaps and

Activities/Deliverables

- Work Session 6: KPIs and metrics (virtual)
- Development of data collection and reporting procedures
- Scorecard design
- Work Session 7: Scorecard demo and feedback (virtual)

clarify reporting roles. The result will be a clear plan outlining data sources, collection frequency and accountability.

- **Design the performance scorecard:** We will continue collaborating with key MDE staff to design the visual scorecard, working toward a user-friendly, accessible design that allows actors at multiple levels (e.g., state, district) to quickly understand how the state is performing against its targets for each goal and KPI. During this process, we will facilitate an additional virtual working session during which the Strategic Planning Committee will provide feedback on a demo of the scorecard so we can further refine the design. By the conclusion of Phase 4, we expect to have completed a near-final design that can be workshopped with input from a broader group of stakeholders in Phase 5.

Phase 5: Stakeholder Engagement and Workshops (August - September 2025 | 3 Weeks)

During Phase 5, Education First and the Strategic Planning Committee will engage a targeted group of internal and external stakeholders, per the engagement plan developed in Phase 2, to review the newly developed strategies and performance scorecard and build momentum for implementation. To facilitate this process, we envision hosting a virtual town hall that provides stakeholders an interactive platform to engage with the plan's updated goals. This session would incorporate live polling, surveys, Q&A and breakout discussions to gather meaningful input and strengthen stakeholder alignment.

Activities/Deliverables

- Virtual town hall
- Work Session 8: Final revisions to strategy and scorecard

Following the town hall, Education First will lead a virtual working session to synthesize key takeaways, address feedback and outline next steps. This structured approach ensures that stakeholders review the strategies and scorecard and actively contribute to their refinement. By leveraging a virtual format, we maximize accessibility and engagement across a broad geographic area.

Education First will then analyze and integrate stakeholder feedback, refining the strategies and scorecard accordingly. The final set of updates will be reviewed and confirmed with the Strategic Planning Committee in a closing virtual working session, ensuring alignment before moving forward with implementation.

Phase 6: Drafting and Finalizing the Strategic Plan (September 2025 | 4 Weeks)

As described above, during Phases 3 and 4, we will have drafted near-final versions of each element of MDE's new strategic plan, including refreshed vision, mission and values statements; priorities, goals and strategies; and KPIs, metrics, baselines and targets. We also will have developed the performance scorecard and documented critical guidance for MDE leadership and staff to implement both the strategy and the scorecard. With the feedback and revisions from Phase 5, we will begin Phase 6 with all the content needed to create the final, public-facing version of the plan and scorecard.

Activities/Deliverables

- Draft strategic plan and performance scorecard

During this short phase, we will work with MDE's communications staff (and, if needed, an external graphic designer whom we can help MDE identify) to develop a visually appealing, user-friendly, accessible microsite or document that presents the key elements of the strategy—including the research at its foundation—and draws connections to the new performance scorecard. With the Strategic Planning Committee, we will review multiple iterations of the public-facing deliverable to

ensure a final product of exceptional quality. We will also support MDE’s communications team as needed to develop and implement a plan for releasing the strategy statewide.

Phase 7: Final Presentation and Handover (October 2025)

During Phase 7, the Education First team will join the Strategic Planning Committee and any other key stakeholders in person to present the final strategic plan and performance scorecard to the Board no later than October 1, 2025, ensuring clarity on key elements and next steps for implementation. During this trip, we will also deliver in-person training for MDE staff to help them understand the plan and their role in it. We may also lead 1:1 and small-group meetings with key MDE leaders and staff during this phase to address outstanding questions and support their preparations for implementation.

Activities/Deliverables

- Final presentation (in person)
- Final strategic plan and performance scorecard
- Staff training and support

Phase 8: Implementation and Monitoring Plan (October 2025 - April 2026)

In our final phase of work, we will provide the MDE with a structured roadmap it can follow to implement the strategic plan and scorecard, including timelines, resources and responsibilities. The plan will include recommended mechanisms for tracking and reporting on progress to key stakeholders to allow for mid-course corrections over time.

We anticipate delivery of the final roadmap and monitoring plan by early November. We understand, however, that implementation of the new strategy—a complex undertaking given the many moving parts MDE manages—will require significant change management capacity. We propose assigning a member of our team to serve as an advisor to key leaders at MDE throughout the remainder of the contract period to help navigate the changes associated with the plan, troubleshoot challenges along the way and ensure key milestones are met.

Activities/ Deliverables

- Implementation roadmap and monitoring plan
- Final project debrief (virtual, 1 hr)

To conclude our engagement, we will facilitate a project debrief call with the Strategic Planning Committee to reflect on work accomplished, lessons learned and any final next steps.

Component 2: Administration

Tab 2: Resumes for Key Personnel

Proposed Project Team

This proposal is submitted with the understanding that project staffing can only be finalized once the contract is executed. Education First will ensure the project team assembled for this engagement will meet all qualifications regarding skill, expertise and experience. A team will be available to start working with you two weeks after accepting this scope of work. On the following pages, we provide resumes for our proposed team for this engagement:

- **Dr. Ann Duffy, Principal Consultant, Accountable Project Lead:** A former Mississippi resident, Ann has more than three decades of experience designing and implementing initiatives to improve student success. She has led many strategic planning engagements at Education First, including a partnership with a diverse coalition of postsecondary funders, the Arts Education Partnership, TeachPlus and various district and state agency strategic initiatives. She currently serves as the Georgia state liaison to the Regional Comprehensive Center, coordinating technical assistance to support capacity-building for the agency. Previously, Ann was the first executive director of Teach For America (TFA) in the Mississippi Delta, served as the director of TFA in Louisiana and also directed programming for TFA at the national level. She also worked as the community organizer with Parents for Public Schools based in Jackson, MS, and served as an executive in state education agencies in Massachusetts and Georgia.
- **Kenny Smith, Senior Consultant, Project Manager:** Kenny brings nearly two decades of experience supporting organizations and agencies in strategic planning and change management to his work at Education First, where he focuses on recruitment and retention of high-quality educators. Kenny has led several initiatives to furnish district-level policy recommendations aimed at strengthening local teacher pipelines, and has also provided strategy development for Chicago Public Schools and St. Paul (MN) Public Schools, including the design and launch of Teach Chicago Tomorrow. Previously, Kenny provided research, partnership development and project management support for the University of Colorado Boulder, the Colorado Charter School Institute, Denver Public Schools, the Colorado Department of Education and Chicago Public Schools.
- **Emnet Shibre, Associate Consultant, Lead Researcher:** Emnet contributes research and analysis to Education First projects related to teacher preparation, school improvement and intervention, and curriculum and instruction. Emnet has worked with clients such as the Ohio Department of Education to develop a math plan, the Gates Foundation to support their Teacher Preparation & Transformation Centers, the Texas Education Agency to develop a framework for teacher apprenticeships, and Chicago Public Schools to develop a framework for AI enhancements. Previously, Emnet served as a research associate for SRI International, where she worked on a range of research and evaluation projects funded by the U.S. Department of Education, and started her career in the classroom at Denver Public Schools.

ANN L. DUFFY

4250 Overland Drive, Roswell, GA 30075 | (770) 315-6253 | aduffy@education-first.com

PROFESSIONAL EXPERIENCE**Principal**

2023–current

Education First

- Contributes to internal strategy-setting and execution of service offerings for foundations, nonprofits, educational institutions and systems (districts, CMOs) and state education agencies; Builds long-term relationships with clients and thought leaders nationwide
- Serves as accountable project leader on a variety of client engagements; Oversees successful projects, including building capacity, advising clients, and ensuring that project deliverables meet excellence standard; Coordinates regularly with the project manager and client to ensure project success, including budgeting, planning and regular reporting against the contract, and providing and seeking feedback from the client and team members
- Mentors, guides and manages team members; Supports inclusive project teams that challenge and empower all team members to grow and reach their potential
- Sample projects: Coaching SEA and CMO leaders in the development of [innovative assessments](#); leading a multi-state [learning network](#) on Guided Pathways and Student Success for Community Colleges in Arizona, Oregon and Washington; coordinating a [community of practice](#) for LEAs on recovery strategies (science of reaching and community schools); Leading funder collaboratives on education equity agendas and postsecondary investments in California; Strategic support for GaDOE as the Region 6 Comprehensive Center SEA [Principal Liaison](#) for Georgia

Senior Consultant

2012–2023

- Served as project manager for a variety of Education First projects to provide high quality technical assistance to clients including program design; research and analysis of education policy options; development of “client-ready” presentations, policy memos, briefs, reports and other products
- Sample projects: Coaching district leaders in the development of principal pipelines; Coordinated grant making and technical assistance for the Collaborating Districts Initiative, a NoVo Foundation project supporting social and emotional learning in public schools; Facilitated development of performance targets, strategic communication materials and website content for Georgia’s Alliance of Education Agency Heads to support the state’s P-16 reforms; Facilitated state teams designing and implementing Race to the Top grants, teacher evaluation systems and Common Core aligned assessments

Division Manager for Policy, Planning and Performance Management

2011–2012

Abu Dhabi Education Council, Abu Dhabi, United Arab Emirates

- Developed, updated and implemented the P-12 Policy Strategic Plan and Sector budget
- Recommended and advocated for P-12 Education policies, guidelines, standards and regulations
- Set P-12 Policy Sector targets and indicators
- Monitored P-12 Education performance at the Emirate level
- Researched and recommended school calendar and instruction hours
- Coordinated with external stakeholders, including principals, universities, and vendors

Director of Policy Development

2002–2010

Georgia Leadership Institute for School Improvement, Atlanta, Georgia

- Coordinated design and implementation of district-based preparation programs for aspiring leaders; managed program redesign for educational leadership preparation; and chaired external review team
- Directed policy analysis for the Executive Committee; conducted policy audits; made policy recommendations based on program development, and evaluated the results
- Directed the Georgia State Action for Educational Leadership Project (SAELP), a Wallace Foundation initiative and served as Project Director for Rising Stars, a USDOE funded initiative
- Secured operating and program funds from public and private sponsors, raising over \$15 million

Director, Teacher Career Center

2002–2003

Board of Regents of the University System of Georgia, Atlanta, Georgia

- Designed and implemented a state-wide system of personalized career counseling for aspiring teachers with a focus on those from nontraditional backgrounds
- Maintained communication and coordination with teacher preparation institutions, P-12 schools, and the University System of Georgia Teacher Preparation Recruitment Initiative

Associate Commissioner for Educator Quality

1999–2002

Massachusetts Department of Education, Malden, Massachusetts

- Led department policies, initiatives, programs, and procedures regarding the professional life of public school educators in Massachusetts; managed a staff of 48 and a \$4 million operating budget
- Managed a \$70 million Teacher Quality Endowment, which funded incentive programs for teacher recruitment and retention; Coordinated and implemented new licensure regulations, including alternate route programs, performance assessments, induction programs, and approval of educator preparation programs

Partner

1998–1999

The New Teacher Project, New York, New York

- Consulted state departments of education and public school districts; tailored and implemented human capital strategies for new teacher recruitment, selection, training, and retention

Director of Chapter Development

1995–1998

Parents for Public Schools, Jackson, Mississippi

- Designed and managed the local chapter development program: Increased number of chapters from 28 to 63 and states from 12 to 26; facilitated strategic planning sessions for local chapters; managed all site expansion including targeting, recruitment, and governance

Various Roles: Teach For America

1991–1995

Teach For America, New York, New York

- National Program Director, TEACH! (New York, New York; 1994–1995): Managed implementation of local teacher support programs; led launch teams in new site development
- Executive Director, Louisiana (New Orleans, Louisiana; 1992–1994; Mississippi Delta, 1991-1992): Coordinated statewide TFA program serving in urban and rural school districts

SELECTED COMMITTEES and TEACHING

Adjust professor, University of Georgia, Educational Administration and Policy Program, various courses 2014-2021

Board of Directors, Georgia Budget and Policy Institute, 2017-current

Chair, Board of Trustees, American Community School of Abu Dhabi, 2010-2012

Georgia School Leader Evaluation Advisory Board, 2004-2010

National Board for Professional Teaching Standards, Accomplished Principal Standards Committee; Council of Chief State School Officers, Interstate Consortium on School Leaders, 2004-2008

EDUCATION

Ph.D. *Educational Administration and Policy*, University of Georgia, Athens, GA, 2011

M.B.A., *Business Administration*, Millsaps College, Jackson, MS, 1997

B.A. *Social Studies*, Harvard College, Cambridge, MA, 1990

KENNETH (KENNY) SMITH
 2905 Inca St. Apt. 1025, Denver, CO 80202
ksmith8g@gmail.com - (312) 505-4671

WORK EXPERIENCE

Education First Consulting

Virtual

Senior Consultant

2022 - Present

Direct the overall work of client engagements, managing project teams and client relationships to ensure on-time, high-quality deliverables on projects in talent management strategy, strategic planning, effective grantmaking and other relevant topics across the K-12 education landscape.

- Discern client needs, develop trusting relationships and manage complex and challenging engagements involving senior executives in some of the nation's leading school systems, states and organizations
- Understand root causes, design with and for people most proximate to the problems and deliver equitable, effective and innovative solutions to address client challenges
- Build and lead inclusive project teams on which members experience positive professional growth and where constructive feedback is regularly shared and accepted
- Successful client engagements that have led to repeat business include **Chicago Public Schools, St. Paul Public Schools, the National Public Education Support Fund, the Joyce Foundation** and the **Bill & Melinda Gates Foundation**, among others

Consultant

2018 - 2021

Provided day-to-day project management and leadership for client engagements related to talent management strategy, strategic planning, effective grantmaking and other relevant topics across the K-12 education landscape.

- Oversaw successful projects, including building capacity in and advising clients to ensure that project deliverables were met including research plans, strategy and program documents, policy memos, briefs, status reports, interim reports, technical reports, presentations, abstracts and manuscripts
- Developed and executed on project work plans according to client needs and budget constraints, adapting these plans to reflect changes in project requirements while adhering to the budget and meeting client goals and deadlines
- Successful engagements included (but are not limited to):
 - Leading and convening the **Data Funders Collaborative**, a cross-organizational group of funders engaging in collective action and grantmaking to support grantees use of data for social action
 - Leading **Chicago Public Schools** through a strategic planning process that resulted in recommendations to support the district's efforts to recruit and retain BIPOC teachers
 - Successfully launching **Teach Chicago Tomorrow**, a teacher pathway partnership program between **Chicago Public Schools, City Colleges of Chicago** and **Illinois State University** that aims to support CPS graduates in efforts to become future CPS teachers
 - Developing a new teacher recruitment and retention strategy for **St. Paul Public Schools** that has an intentional focus on BIPOC teachers

University of Colorado Boulder, College of Engineering and Applied Science

Boulder, CO

Director of Partnerships

2016 - 2018

Led partnership development efforts for the **BOLD Center**, responsible for College-wide diversity and inclusion initiatives and outreach aimed at increasing the enrollment of and matriculation rates for underrepresented minority and female students in the College of Engineering and Applied Science (CEAS).

- Collaborated with the statewide K-12 education community to create programming for students and schools to support CEAS efforts to increase underrepresented minority and female student enrollment
- Cultivated corporate partnerships aimed at supporting student career development and CEAS diversity and inclusion efforts

- Served as primary BOLD Center grant-maker, awarding select aligned community organizations grant awards totaling \$20,000 annually
- Worked with CEAS faculty on research proposal development and manage opportunities for faculty to engage in broader impact outreach with statewide K-12 education community

Colorado Charter School Institute

Denver, CO

Analyst

2015 – 2016

Led program oversight and continuous improvement planning efforts for state charter school authorizer and its portfolio of 36 schools to ensure quality and compliance with state and federal requirements.

- Managed programming and accountability efforts for portfolio schools in the following areas: school readiness (including state-funded preschool and kindergarten), early literacy, postsecondary readiness, and school operations (including facilities, transportation, safety, and student information systems)
- Oversaw all aspects of the Unified Improvement Planning (UIP) process for portfolio schools, including consultation with school teams on plan development, reviewing plans and providing feedback to schools, timeline management, and submission to the State
- Served as the District Assessment Coordinator responsible for overseeing all state-required assessment processes, documentation, training, and materials in portfolio schools
- Developed, implemented, and monitored policies and procedures for schools' interim assessment testing to support standardizing school test administration practices

Denver Public Schools

Denver, CO

Senior Manager of School Support and Operations

2013 – 2014

Led the Office of School Reform and Innovation's (OSRI) effort to oversee compliance and provide support to autonomous schools around core operational functions including finance, HR, IT, and student information systems.

- Led analysis of operational functions in charter and innovation schools as part of the school development and renewal process
- Defined strategy and theory of action to guide district work that established a menu of budget flexibilities for innovation schools
- Developed a strategy and schedule for training-level supports for schools to ensure that they had the information necessary to utilize existing district operational systems
- Managed six analysts (4 finance, 2 IT) responsible for working directly with schools

Project Leader, Assessments Beyond the Common Core

2011 – 2013

Led all aspects of the district's effort to develop 25 common assessments for content areas beyond reading, writing, and math (includes the arts, PE, science, social studies, and world languages) for the purposes of informing teacher evaluations through the Leading Effective Academic Practice (LEAP) program.

- Managed staff across all district departments (including teachers) involved in assessment development and led teacher outreach and engagement activities
- Monitored project budget totaling \$250,000 over two years
- Managed all district projects related to the development and administration of new formative and summative assessments aligned to the Common Core State Standards and Colorado Academic Standards
- Convened the Student Outcomes Steering Committee, a cross-departmental leadership group charged with making key recommendations related to the district's use of student assessment data in teacher evaluations

Colorado Education Initiative **Denver, CO**
Project Manager – Standards Implementation 2011
 Managed the **Colorado Department of Education's** effort to support to Colorado school districts implementing the Common Core State Standards and the Colorado Academic Standards across all content areas and grade levels.

- Managed a team of seven content specialists charged with developing supports for educators to assist with standards implementation
- Developed short- and long-term project plans for the State's support for standards implementation
- Acted as the liaison for the standards implementation team with other units and reform efforts within the Department of Education
- Maintained standards implementation toolkit, an internet-based resource for schools and districts that supports each phase of standards implementation

Colorado Children's Campaign **Denver, CO**
Policy Analyst 2008 – 2011
 Provided support in the development, management, and coordination of projects and initiatives across core issue areas. Work included policy research, analysis, and dissemination of information through written and electronic sources.

- Conducted research and reporting on core issues areas including K-12 education, early childhood education, child health and wellness, child poverty, and fiscal policy
- Wrote brief summaries and analyses of research to inform directors' writing, policy considerations, and legislative negotiations and testimony
- Reviewed state and national policy reports, data, and research related to core issue areas and summarized for directors
- Managed the Colorado Graduates Initiative, a multi-organization collaborative aimed at reducing the state's dropout rate and increasing the high school graduation rate

American Institutes for Research **Chicago, IL**
Research Specialist 2006 – 2008
 Provided research support, including data collection and policy analysis, on various educator effectiveness projects.

- Conducted research and compiled information for the Center for Educator Compensation Reform (CECR), a center funded by the U.S. Department of Education
- Collected and analyzed teacher certification and licensure data and contributed to literature review for a large teacher interstate mobility study
- Analyzed qualitative data for various policy research studies including an alternative routes to certification study conducted in partnership with the University of Illinois at Chicago and funded by the Joyce Foundation
- Provided significant research assistance to support the development of a policy framework focused on learner, teacher, and systems standards for Iowa

Chicago Public Schools **Chicago, IL**
 Compliance Specialist 2005 - 2006

- Analyzed educator credentials for compliance with NCLB requirements and 'Highly Qualified.'

EDUCATION

University of Colorado Boulder **Boulder, CO**
 M.B.A with emphasis in Finance and Strategy 2016

University of Virginia **Charlottesville, VA**
 M. Ed., Education Policy 2004
 B.A., Sociology 2003

APPOINTMENTS, FELLOWSHIPS, AND AWARDS

Board of Directors, Project VOYCE – Denver, CO	2022 - Present
Board of Directors (Governor-appointed), Colorado Charter School Institute – Denver, CO	2021 - Present
Board of Directors, Heart & Hand Center for Youth and Their Families – Denver, CO	2021 - Present
Board Finance Committee Member, Invest in Kids - Denver, CO	2020 - Present
Board of Directors, Highline Academy Charter School - Denver, CO	2019 - Present
Colorado Education Policy Fellow	2012 - 2013

SELECT ARTICLES AND REPORTS

- Smith, K. (2016). Analyzing market factors for new charter school development: recommendations for education entrepreneurs. Boulder, CO.
- Smith, K. (2013). Local challenges implementing standards, assessment, and educator effectiveness reforms in Colorado: considerations for policymakers. Denver, CO.
- Smith, K. (2009). Widening the gap: the potential impact of eliminating the Colorado preschool program. Denver, CO. Colorado Children’s Campaign.
- Smith, K. (2008). Full-day kindergarten: a matter of quality. Denver, CO. Colorado Children’s Campaign.
- Groginsky, S. & Smith, K. (2008). Child care reimbursement rates and the 75th percentile. Denver, CO. Colorado Children’s Campaign.
- Rowland, C. & Smith, K. (2006). Innovations to improving teacher quality: a matter of time. Naperville, IL. Learning Point Associates.
- Brown-Sims, M., Rowland, C., Sexton, S. & Smith, K. (2007). Iowa teacher quality enhancement grant: Year 1 final report. Report submitted to the Iowa Department of Education. Naperville, IL. Learning Point Associates.

Emnet Shibre

emnetshibre@gmail.com | (303) 618-1449

ACADEMIC BACKGROUND

Harvard Graduate School of Education, Cambridge, MA

May 2020

Master of Education

Education Policy & Management

St. Olaf College, Northfield, MN

May 2016

Bachelor of Arts in Political Science

Management Studies Concentration

PROFESSIONAL EXPERIENCE

Education First –

January 2025- Present Associate Consultant

September 2023- December 2024 Associate

- Clients: Gates Foundation, Texas Education Agency, Ohio Department of Education and Workforce, Chicago Public Schools, Chan Zuckerberg Initiative
- Create research plans and analyze qualitative data, including survey data, interview data, desk research, document analysis, and research reports
- Create “client-ready” PowerPoint presentations, policy memos, frameworks, briefs, reports, case studies, and landscape scans
- Design and facilitate client meetings and convenings

SRI International – Arlington, VA **December 2020- November 2022 Education Research**

Associate

- Developed evaluation plans, designed surveys, and drafted interview protocols for evaluations.
- Led data collection activities for evaluations, including survey administration, interviews, focus groups, and classroom observations.
- Coded interview data for analysis.
- Synthesized quantitative and qualitative data into written analysis for publications, reports, briefs, blogs, conferences, and webinars.
- Interfaced and collaborated regularly with external stakeholders, including school administrators, district research directors, state departments of education, and high-profile clients for research and technical assistance projects.
- Provided project management support by planning meetings, coordinating workshops, creating timelines, tracking progress of project milestones, making recommendations for project procedures, creating and managing project documents and databases, and coordinating data collection activities.
- Developed and maintained databases of study participants, sites, and response rates for accurate research implementation.
- Gave oral presentations on research findings in conjunction with senior staff.

Democratic National Committee – Washington, D.C. **September 2020-November 2020 Political**

& Organizing Department Intern

- Supported the Biden for President Late Help team by contacting 150 volunteers on behalf of the campaign, gathering data from state Board of Election offices, reaching out to Policy Committee members for canvassing, and coordinating rides to the polls.
- Liaised with Women for Biden team to host national phone banks, participated in weekly phone banks in battleground states.
- Collaborated with supervisor to discuss messaging and write talking points sent to women’s constituency group.
- Responded to constituent needs, questions, and feedback via phone on a weekly basis. Prepared strategic memos for the department to help strengthen youth engagement. Compiled research on the party’s notable candidates.
- Managed a database of over 15,000 DNC members as part of an effort to build DNC infrastructure.

Denver School of Science and Technology – Denver, CO **August 2016-June 2019 Chemistry &**

Civics Teacher

- Responsible for the emotional and academic development of over 90 students.
- Managed one section of 10th grade chemistry and three sections of 12th grade civics.
- Guided over 70 seniors through the design thinking process to produce senior projects with a social justice connection.
- Designed and presented engaging, culturally relevant lessons.
- Analyzed data to drive planning, inform instruction, and improve student outcomes.

- Researched new ways to accommodate students of different language backgrounds and ability levels and evaluated student progress monthly.
- Collaborated with colleagues to create plans for improving student outcomes.
- Regularly received coaching from a director of curriculum and instruction and implemented feedback

Denver School of Science and Technology – Denver, CO August 2016-June 2019 Advisor

- Monitored the academic progress of fifteen high school girls on a weekly basis.
- Provided emotional support to students and advocated on their behalf in meetings with counselors and other teachers.
- Planned monthly team-building exercises and outings.
- Communicated with families throughout the school year and organized parent-teacher conferences at the end of each trimester to further support student outcomes.
- Researched opportunities for students and ensured that all students are signed up for summer programs and internships yearly.

Ethiopians College Bound – Denver, CO October 2017-June 2019 Board Member

- Board member of a company dedicated to improving educational outcomes for first generation Ethiopian American students by providing resources for parents.
- Coordinated and led workshops for parents about preparing students for college.
- Advised founder of organization with relevant information regarding the college application process, regional education policy, and mentor recruitment.

Project Voice – Denver, CO January 2017-May 2018 Teacher Representative

- Teacher representative for an organization dedicated to increasing community engagement among local high school students.
- Organized on-campus meetings for students and taught lessons on local and national social justice movements and community organizing.
- Supported students from DSST: Cole at bi-monthly collective meetings for students and teachers from throughout Northeast Denver and at canvassing events.
- Worked with students, community members, and other stakeholders to determine how public funds would be spent as part of a participatory budgeting project.

SELECTED WRITTEN PRODUCTS

Publications

- Marcus, J., Peery, B., Pellerin, E., **Shibre, E.**, Klute, M., Mislevy, J., Wilkerson, S., & Schaefer, V. (2021). *Regional Educational Laboratory Appalachia: Research-based strategies for effective remote learning: Designing effective instruction for a hybrid model. Facilitators' handbook*. Arlington, VA: SRI International.
- Parker, C.E., & **Shibre, E.** (2021). *Think Forward New England: Profiles of Innovation: Margarita Muñiz Academy*. Center on Reinventing Public Education. <https://crpe.org/profiles-of-innovation-margarita-muniz-academy/>
- **Shibre, E.**, & Woodworth, K. (2021). *Think Forward New England: Profiles of innovation: Great Oaks Charter School Bridgeport*. Center on Reinventing Public Education. <https://crpe.org/wp-content/uploads/great-oaks-profile-final.pdf>

Literature Reviews

- **Shibre, E. (2021)**. *What does the research say about professional learning models and opportunities that equip teachers to promote early math skills, particularly early numeracy, for students in preK through Grade 3?* Ask A REL Appalachia at SRI International. <https://ies.ed.gov/ncee/rel/Products/Ask-A-REL/10057>
- **Shibre, E. (2021)**. *What are interventions or components of interventions that promote early numeracy skills for students performing below grade-level benchmarks?* Ask A REL Appalachia at SRI International. <https://ies.ed.gov/ncee/rel/Products/Ask-A-REL/-89711>

Blogs

- Parker, C.E., & **Shibre, E.** (2021, November 17). Think Forward New England: Schools supporting multilingual learning. *Center on Reinventing Public Education*. <https://crpe.org/schools-supporting-multilingual-learners>.
- **Shibre, E.**, & Woodworth, K. (2021, November 17). Think Forward New England: Teacher collaboration: Students and educators need systematic organizational responses this school year. *Center on Reinventing Public Education*. <https://crpe.org/teacher-collaboration-students-and-educators-need-systemic-organizational-responses-this-school-year/>.
- **Shibre, E.** (2021, September 27). Leveraging evidence-based practices at school and at home: Making up for lost time in early literacy. *U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Appalachia*.

SKILLS & CERTIFICATIONS

- **Analytic/Research Programs:** MS Excel, QuickBase, Zotero, Dedoose, Stata 17, ATLAS.ti
- **Languages:** Spanish (Basic), Amharic (Proficient)
- **Certifications:** CLASS UE

Tab 3: References

Client References for Education First

Client Name	Arkansas Department of Education
Contact Name and Title	Karli Saracini, Assistant Commissioner of Educator Effectiveness & Licensure
Contact Address	Four Capitol Mall, Little Rock, AR 72201
Contact Telephone Number	501.683.4095
Email Address	karli.saracini@ade.arkansas.gov
Type of Work Provided	Development of Arkansas State Review Guide for educator preparation programs and Educator Workforce Strategic Plan; currently supporting implementation of the strategy
Contract Dates	4/17/23 - 4/22/24, 4/22/24 - 6/30/25

Client Name	Colorado Department of Education
Contact Name and Title	Rhonda Haniford, Deputy Commissioner, Student Excellence
Contact Address	201 East Colfax Ave, Room 405, Denver, CO 80203
Contact Telephone Number	303.909.7242
Email Address	haniford_r@cde.state.co.us
Type of Work Provided	Facilitation of statewide 26-member task force to recommend improvements to Colorado's accountability and accreditation system, including creating final report of findings
Contract Dates	8/9/23 - 12/11/24, 6/1/24 - 10/31/24

Client Name	Georgia Department of Education
Contact Name and Title	Matt Jones, Chief of Staff
Contact Address	205 Jesse Hill Jr. Drive SE, Atlanta, GA 30334
Contact Telephone Number	404.657.1175
Email Address	mattjones@doe.k12.ga.us
Type of Work Provided	Capacity-building support for strategic initiatives targeting educator shortages, educator evaluation and internal cross-agency services to districts
Contract Dates	1/4/22 - 6/30/22, 7/1/22 - 9/30/22, 10/3/22 - 11/10/23, 10/1/23 - 12/31/24, 10/1/24 - 9/30/25

Component 3: Price

Tab 4: Price/Budget

Cost Data/Budget

Considering the expertise, capacity and timeline required to deliver this scope of work, we estimate a total budget of **\$365,000** to conduct the work as proposed, which includes more than 1,380 consulting hours across our project team, as well as \$23,500 in project expenses, as shown below. Please consider this proposal an initial estimate and know that we would be happy to negotiate our scope of work and budget with you to arrive at an approach that meets your needs.

Deliverable	Fees	Expenses	Subtotal
Project work plan	\$39,093 (151 consulting hours)	\$3,000 (travel for project launch, 1 night) \$9,000 (performance bond)	\$51,093
SWOT analysis and environmental scan report	\$94,247 (429 hrs)	\$3,900 (travel for stakeholder engagement, 2 nights) \$450 (transcription fees)	\$98,597
Stakeholder engagement plan	\$3,460 (12 hrs)		\$3,460
Draft strategic plan and performance scorecard	\$104,683 (415 hrs)	\$3,000 (travel for strategy session, 1 night)	\$107,683
Final strategic plan and performance scorecard	\$4,264 (16 hrs)		\$4,264
Final presentation and training	\$23,606 (89 hrs)	\$3,900 (travel for final presentation/training, 2 nights) \$250 (printing)	\$27,756
Implementation roadmap	\$60,403 (223 hrs)		\$60,403
Monitoring and reporting protocols	\$11,744 (48 hrs)		\$11,744
TOTAL			\$365,000

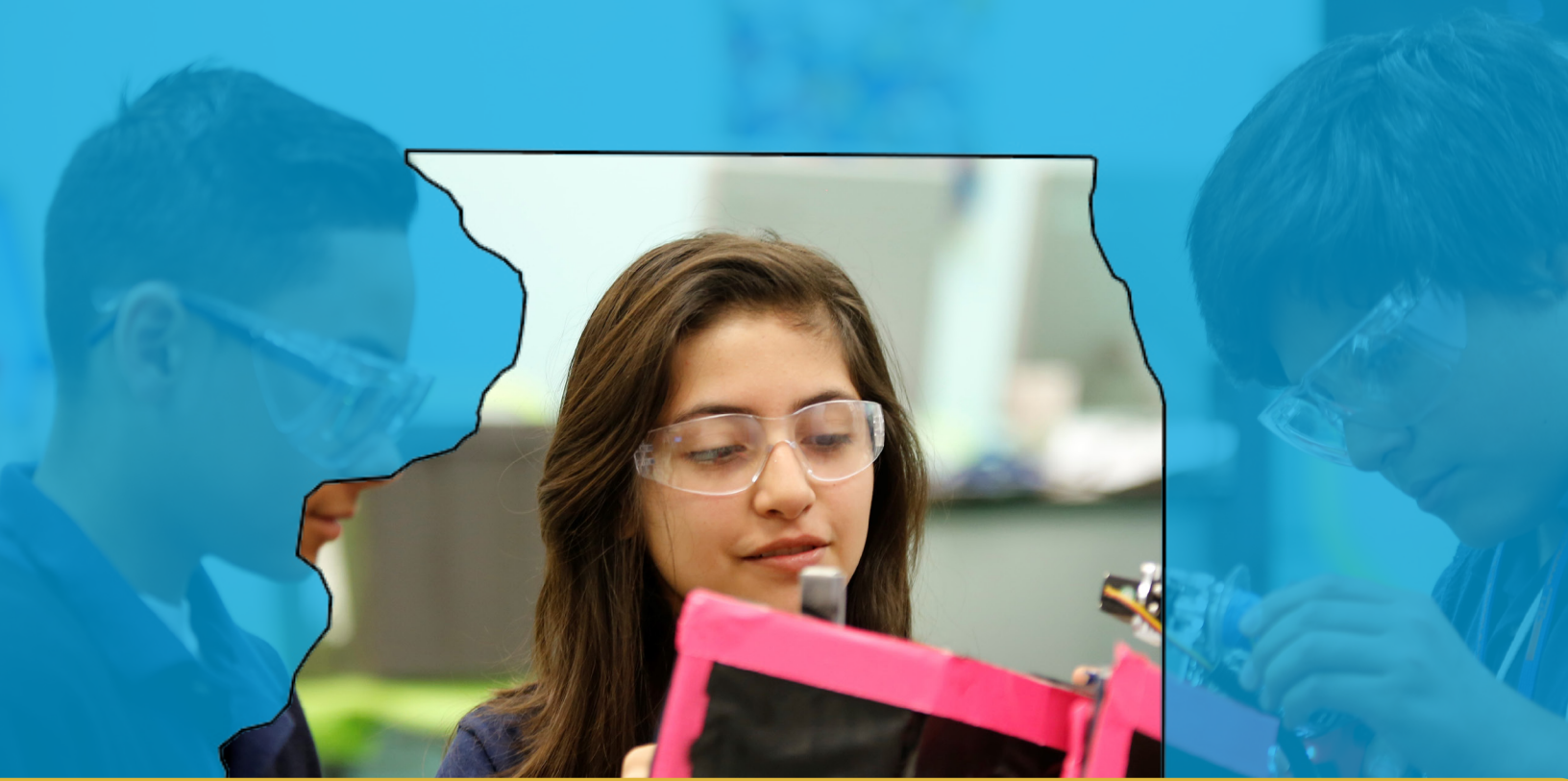
Component 4: Other

Tab 5: Additional Relevant Information

Work Samples

On the following pages, we provide an excerpt from the [Illinois State Board of Education 2020-2023 Strategic Plan](#), which Education First developed and co-authored with ISBE, as described in Tab 1, Our Qualifications. Below we link to three additional examples of publications we have authored on behalf of state education agencies:

- [Strengthening Missouri's Teacher Pipeline](#)
(<https://www.education-first.com/insights/our-publications/strengthening-missouris-teacher-pipeline/>)
- [Final Report of the Colorado Accountability, Accreditation, Student Performance, and Resource Inequity Task Force](#) (<https://www.cde.state.co.us/accountability/accountability-task-force>)
- [Report on Delaware Virtual Learning in a Post-COVID Environment](#)
(<https://education.delaware.gov/wp-content/uploads/2024/05/Report-on-Delaware-Virtual-Learning-in-a-Post-COVID-Environment-May-15-2024.pdf>)



Illinois State Board of Education 2020-2023 STRATEGIC PLAN



Illinois
State Board of
Education

Student Learning | Every child will make significant academic gains each year, increasing their knowledge, skills, and opportunities so they graduate equipped to pursue a successful future, with the state paying special attention to addressing historic inequities.

BACKGROUND

Students began the 2020-21 school year after several months of remote learning and a summer break without many of their normal educational activities. Educators now must cement the previous year's standards, support recovery from the normal summer slide, and support new learning gains, while teaching both in-person and remotely. Successfully accomplishing these goals begins and ends with assessment and school improvement.

Equitable access to technology is key to equitable student outcomes – and not only in a remote learning environment. Even while students are learning primarily in-person, technology allows learning to be more personalized, enables students to collaborate with peers outside of school, equips students with access to the resources they need to supplement their learning at home, and develops 21st-century workforce skills. ISBE's strategic plan aims to bridge the digital divide that exists in Illinois.

ISBE's strategic plan also will build upon the IL-EMPOWER 2.0 system of supports for high-need schools. The Every Student Succeeds Act (ESSA) State Plan, approved in 2017, transformed support and accountability in Illinois to be based on multiple measures of school performance and to promote best practices for sustained change. An evaluation in 2019 produced further enhancements to Illinois' system of supports. IL-EMPOWER 2.0 now drives continuous improvement through additional funding; planning informed by standards, data, and stakeholder engagement; and partnerships that supply expertise and capacity in areas of need.

Educators now must cement the previous year's standards, support recovery from the normal summer slide, and support new learning gains, while teaching both in-person and remotely.

Lastly, ISBE's strategic plan will make assessment data more useful, accessible, and actionable for improving alignment between standards and curricula, while reducing the time spent taking assessments. Most importantly, ISBE will produce a Spanish Language Arts assessment, so Spanish-speaking English Learners can more accurately show what they know and can do, which will result in high-quality supports for their learning.



Strategies and Related Success Measures

1.1 Support best practices and continuous quality improvement, including an emphasis on equity and diversity in order to support student learning while also addressing remote and blended learning.

By end of the 2020-21 school year

The Curriculum Evaluation Tool (CET) will be developed, refined based on stakeholder feedback, and made available to all schools/districts. A pilot of 5% of districts will use the ISBE CET.

In August 2019, 62% of districts provided one device per student. By the end of the 2020-21 school year, 75% of districts will provide one device per student.

By end of the 2021-22 school year

At least 25% of districts will use the ISBE CET and at least 10% of districts that used the CET will have maintained or improved student performance on state assessments.

By the end of the 2021-22 school year, 80% will provide one device per student.

By end of the 2022-23 school year

At least 50% of districts will use the ISBE CET and at least 20% of districts that used the CET will have maintained or improved student performance on state assessments.

1.2 **Assist** districts in addressing COVID-19's impact on learning resulting from the suspension of in-person instruction by providing supports around Priority Learning Standards.

By end of the 2020-21 school year

75% of districts participating in professional learning will report increased alignment of curriculum to Priority Learning Standards.

By end of the 2021-22 school year

50% of districts that participated in ISBE/ROE-led professional learning will have maintained or improved student performance on state assessments.

1.3 **Increase** supports for schools identified with the greatest need through ISBE's partnerships with the Regional Offices of Education (ROEs), Intermediate Service Centers (ISCs), and primary support entities.

By end of the 2020-21 school year

At least 60% of Comprehensive Support schools will work with a primary support partner.

By end of the 2021-22 school year

At least 70% will work with a primary support partner to improve student growth by 3 percentage points.

By end of the 2022-23 school year

At least 80% will work with a primary support partner to improve student growth by 3 percentage points.



1.4 **Provide** tiered state-level support for schools that remain in the Comprehensive Support designation for more than four years.

By end of the 2020-21 school year

10% of schools will no longer be identified as Comprehensive Support based on 2018 Report Card data.

By end of the 2021-22 school year

An additional 10% of schools will no longer be identified as Comprehensive Support based on 2018 Report Card data.

By end of the 2022-23 school year

An additional 13% of schools will no longer be identified as Comprehensive Support based on 2018 Report Card data.

1.5 **Expand** literacy on the utilization of assessment and on assessment data to accurately identify learning gains, achievement gaps, and COVID-19's impact on learning.

By end of the 2020-21 school year

ISBE will have a plan to enhance reports, create professional development resources, and release communications to expand assessment literacy.

By end of the 2020-22 school year

ISBE will have created enhanced reports and professional development resources will be completed and implemented. Illinois Assessment of Readiness reports will include Lexile and Quantile data.

1.6 **Develop** a native language assessment.

By end of the 2020-21 school year

Spanish Language Arts Standards will be developed and adopted by the Board.

By end of the 2021-22 school year

ISBE will have developed test items based on the adopted/approved Spanish Language Arts Standards.

By end of the 2022-23 school year

ISBE will have piloted the test items based on the adopted/approved Spanish Language Arts Standards. The assessment will be completed and fully implemented during the 2023-24 school year.

Tab 6: Signed Contingent Fee/ Acknowledgement of Amendments



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Carl Christopher

05/02/25

Authorized Signature

Date

Carl Christopher

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Carl Christopher

Title: Partner and Chief Finance

Signature: *Carl Christopher* Date: 05/02/25



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Carl Christopher

05/02/25

Authorized Signature

Date

Carl Christopher

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor’s bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The Offeror represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s bid or proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Carl Christopher

Title: Partner and Chief Finance

Signature: *Carl Christopher* Date: 05/02/25

Modifications or additions to any portion of this document may be cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor's current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror's proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Appendix A – Proposal Cover Sheet

Company/Name: Engage! Learning, LLC. dba engage2learn

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Matt Bachman, Chief Financial Officer
Mailing Address	8911 North Capital of Texas Hwy, Ste 4200-1065
City, State, Zip	Austin, TX 78759
Telephone:	(833) 325-4769
E-Mail Address:	submissions@engage2learn.org


Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? _____
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: February 3, 2025



Strategic Planning and Performance Scorecard 3120003047

Mississippi State Board of Education

Offeror: Engage! Learning, LLC dba engage2learn
8911 North Capital of Texas Hwy, Ste 4200-1065, Austin, TX 78759

Contact: Chris Everett, Ed.D., Chief Strategy Officer
833.325.4769 x 734
submissions@engage2learn.org



Cover Letter

Office of Procurement
The Mississippi Department of Education
359 North West Street
Jackson, Mississippi 39201

Engage2learn (e2L) is pleased to respond to the Mississippi Department of Education (MDE) RFX 3120003047 for the development of a comprehensive state-level strategic plan and performance scorecard. We appreciate the opportunity to collaborate with the MDE in establishing a clear, actionable roadmap that aligns with your mission, goals, and evolving priorities while integrating measurable indicators to track progress and ensure accountability.

With extensive experience in strategic planning, performance measurement, and stakeholder engagement, our team of education experts will support MDE in the design of a state-level strategic plan and performance scorecard that fosters alignment, efficiency, and continuous improvement.

At e2L, we consider the diverse and dynamic landscapes that shape public education entities. Our exclusive focus on K-12 public schools, unique communication and collaboration strategies, and ability to listen to stakeholders and customize solutions based on the unique needs of local context set us apart in the industry. The MDE will benefit from our approach that ensures the strategic plan remains adaptable to emerging trends, policy changes, and stakeholder needs, fostering a culture of continuous improvement and innovation. We intentionally design stakeholder engagement so that all stakeholders are ambassadors of the shared vision and committed to the strategic direction.

Through collaborative development, we can contribute to the excellence of Mississippi schools and support MDE in creating a world-class educational system that gives students the knowledge and skills to be successful in college and in the workforce and to flourish as parents and citizens.

Sincerely,



Chris Everett, Ed.D.

Chief Strategy Officer

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Component 1 - Plan of Action

Tab 1 - Production/Detailed Service Plan

Minimum Qualifications

Minimum Qualification	Meets Qualifications?
<p>1a. Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi</p>	<p>Yes. See our business details in Tab 6 with the appendices for proof of good standing.</p>
<p>1b. The age of the Offeror’s business and average number of employees for the past five (5) years</p>	<p>Yes. Engage2learn was founded in 2011. We have employed the following average number of employees each year for the past 5 years: 2020 - 56 2021 - 84 2022 - 122 2023 - 115 2024 - 87</p>
<p>1c. Offerors must list their principals, parent organizations, and subsidiary organizations in their proposal or qualification. Principals shall include founder, investors, owner, co-owners, CEO, Chief, all executive level employees.</p>	<p>Yes. We have provided this information below in our Company Overview.</p>
<p>1d. The abilities, qualifications, and experiences of all persons who would be assigned to provide required services</p>	<p>Yes. Assigned personnel meet the required qualifications listed in Section 2.2 Contractor Prerequisites of the RFP. Please refer to Tab 2 on page (x) for resumes with detailed information on key personnel qualifications.</p>
<p>1e. The required references as noted in Section 3 – References</p>	<p>Yes. We have listed references in Tab 3: References.</p>
<p>1f. The Offeror must provide a detailed plan describing how the scope of services will be planned, implemented, and achieved, and the reports provided that will give the MDE the support</p>	<p>Yes. We have provided a detailed plan below following our Company Overview.</p>

<p>and results required to verify services were accomplished and complete.</p>	
<p>2. The Vendor shall provide all services directly related to this contract from an office(s) located in the United States. Indicate your agreement with this requirement and identify any locations outside the State of Mississippi in which you propose to provide the services described in this solicitation.</p>	<p>Yes. We shall provide all services directly related to this contract from offices located in the United States. Our offsite design work will be provided from offices located in Texas.</p>
<p>3. Include in your responses the total number of years in business and the company's experience related to the scope of work.</p>	<p>Yes. We have been in business for 14 years. Our experience related to this type of work is available in Tab 5: Additional Information.</p>
<p>4. If federal funds are allocated for payment, Offeror must verify its business is not debarred.</p>	<p>Yes. We verify that our business is not debarred.</p>
<p>5. Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.</p>	<p>Yes. We agree to secure a performance bond for 100% of the awarded annual contract amount.</p>

Company Overview

Organization History

Engage2learn is a trusted strategic partner to public schools, helping leaders simplify complex challenges, achieve results faster, and drive measurable improvements through tailored solutions.







Engage2learn was founded in 2011 by our CEO and former educator, [Shannon Buerk](#), because of her passion for supporting public schools in meeting the needs of all students and maximizing educator and learner outcomes.

**Inc.
5000**

Named to Inc. 5000 Top 50 education companies, engage2learn has been a leading strategic planning and talent development partner for the last 13 years, impacting several state agencies, more than 300 school districts, and over 79,000 educators across North America. Utilizing firsthand experience with state and school-level partners and from large urban to small rural partners, engage2learn empowers education leaders to **optimize systems; increasing educator effectiveness**, driving **student success**, and promoting **overall engagement**.

Organization Structure

Engage2learn has employed an average of 108 team members for the past 5 years. Though our headquarters are in Austin, Texas, our team works from various locations across the nation, allowing us to assist school districts throughout the country with ease. The e2L team has the capacity to handle a project of any scope, on-site and virtually, even as it scales over time.

Principals	
 <p>Shannon Buerk Founder & CEO, Minority Owner</p>	 <p>Leeds Equity Partners, LLC Majority Owner</p>
 <p>Chante Truscott Chief People & Equity Officer</p>	 <p>Dr. Chris Everett Chief Strategy Officer</p>
 <p>Jill Galloway Chief of Product Innovation</p>	 <p>Kammi Green Chief of Partner Success</p>



Matt Bachman
Chief Financial Officer

- **Ashley White**
Regional Account Executive
- **Diana Branch**
Executive Director of Partner Success
- **Elizabeth Saenz**
Executive Director of Partner Success
- **Jentessa Williams**
Executive Director of Partner Success
- **Karyn Lynn**
Regional Account Executive
- **Lauren Hurt-Ashwin**
Executive Director of Talent Development
- **Mitzi Clark-Richardson**
Executive Director of Partner Success
- **Nathan Gardner**
Executive Director of Engineering
- **Ryan Pflughaupt**
Executive Director of Creative Marketing
- **Tim Brown**
Regional Account Executive
- **Timothy Jarotkiewicz**
Regional Account Executive
- **Toya Ribail**
Senior Executive Director of Marketing

Parent Organizations

None

Subsidiary Organizations

None

Proprietary Platform

GroweLab[®] Empowers Educators through Data-Driven Insights

Engage2learn is the only partner with a platform that can capture and measure adult growth in competencies aligned to the research. We utilize this talent development platform both internally and externally to develop and track growth, as well as monitor implementation.

GroweLab is an all-in-one, integrated coaching and growth system that empowers adult learners to grow independently with customized and leveled professional learning competencies and 24/7 access to 5,000+ resources, research, asynchronous courses, on-demand coaching, a video library, and a learning community.

With GroweLab, leaders can track the progress of any implementation or project and document all of their professional development and coaching activity in one platform, while also connecting that growth data to student and staff outcomes to measure, quantify, and report on the effectiveness and impact of coaching and implementation.



It is recognized by Digital Promise’s Research-Based Product Certification, Tech Edvocate’s Award for Best Professional Learning App, and the EdTech Breakthrough Awards.



Scope of Services

At engage2learn, we recognize that no school community is the same and that each has its unique traditions and challenges. We understand and value MDE's vision to create a world-class educational system that gives students the knowledge and skills to be successful. Our tailored design process addresses key educational challenges—such as educator retention, chronic absenteeism, student achievement, and resource limitations—ensuring that MDE’s strategic plan and performance scorecard align with local needs. By placing students at the center of every solution, we will empower MDE to create a transformative learning experience that leaves a lasting, meaningful impact on Mississippi’s education system.



Project Overview

Scope and Deliverables 2025	Timeline
Phase I	
Project Initiation/Planning <ul style="list-style-type: none"> Project Work Plan 	April 2025
Environmental Scan and Data Collection <ul style="list-style-type: none"> SWOT Analysis and Environmental Scan Report 	May 2025
Strategy Development	June 2025
Performance Scorecard Development	July 2025
Stakeholder Engagement and Workshops <ul style="list-style-type: none"> Stakeholder Engagement Plan 	August 2025
Drafting and Finalizing the Strategic Plan <ul style="list-style-type: none"> Draft Strategic Plan and Performance Scorecard Final Strategic Plan and Performance Scorecard 	September 2025
Final Presentation and Handover <ul style="list-style-type: none"> Final Presentation and Training 	October 2025
Phase II	
Implementation and Monitoring Plan <ul style="list-style-type: none"> Implementation Roadmap Monitoring and Reporting Protocols 	November 2025-April 2026

Project Initiation/Planning

Deliverable(s): Project Work Plan

Activities

1. Kick-off Meeting: Conduct a project initiation meeting with key SBE and Board Designees clarify objectives, timelines, and roles.
2. Project Work Plan: Develop a detailed project work plan that outlines milestones, timelines, deliverables, and communication protocols.
3. Stakeholder Identification: Identify and document key stakeholders (internal and external) to ensure broad engagement and input throughout the process.

We begin every project with a custom design consultation to collaboratively establish the project plan, clarify roles, agree on responsibilities, design the rollout, and establish the shared online project management system.

Kick-Off Meeting

During the kick-off meeting, the assigned engage2learn Executive Director of Partner Success (EDPS) will work with leaders to create and define a high-level outline of the purpose, objectives, scope, timeline, stakeholders, and expected outcomes, along with establishing clear roles and responsibilities.

Project Work Plan

The engage2learn EDPS will collaborate with leaders to develop a detailed implementation and communication plan that outlines milestones, timelines, deliverables, and communication protocols. During this planning, the group will identify potential risks and develop mitigation strategies, along with allocating resources based on the scope and requirements.

Stakeholder Identification

The engage2learn EDPS will work with leaders to conduct a stakeholder analysis to identify stakeholders and their roles and responsibilities. We will also develop a plan for maintaining open and transparent communication with all stakeholders, providing regular updates on the project's progress, achievements, and challenges.

Environmental Scan and Data Collection

Deliverable(s): SWOT Analysis and Environmental Scan Report

Activities

1. Review of Existing Documentation: Analyze current strategic plans, performance data, and any other relevant documents to understand the organization's context.
2. SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats): Conduct an analysis to assess internal capabilities and external challenges.
3. Environmental Scan: Perform a comprehensive scan of the current educational landscape, including trends, regulations, and technological advancements affecting the state of Mississippi.
4. Stakeholder Surveys/Interviews: Collect input from key stakeholders (board members, educators, policymakers, students, and community members) through surveys, focus groups, or interviews.

Review of Existing Documentation

Engage2learn intentionally takes stock of what has been previously accomplished in the State Department by examining all current state documents, including anything related to the most recent Strategic Plan.

Below are examples of information that is compiled and analyzed to inform the work:

- State Department data (performance and current plans)
- General background on the State Department(history, district breakdown)
- Governance and organization (org chart, board of trustee analysis)
- Students (current enrollment, demographics, projections)
- Personnel (staffing levels, projected needs, certifications)

SWOT Analysis

Engage2learn will facilitate a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis to assess the factors driving positive outcomes and identify areas requiring refinement or strategic realignment. This process will provide data-driven insights to help prioritize initiatives, optimize resource allocation, and ensure sustainable growth. By evaluating internal strengths and weaknesses alongside external opportunities and threats, engage2learn will equip MDE with actionable strategies to enhance effectiveness and maximize impact.

Environmental Scan

Engage2learn uses quantitative and qualitative data points from a variety of sources to create a comprehensive scan of the local educational landscape. Our approach will provide an in-depth analysis of trends, regulations, and technological advancements shaping the state's education system. We will review student demographic and academic performance data, along with personnel, financial, cultural, climate, and organizational information to deliver actionable insights that support informed decision-making for policymakers, educators, and stakeholders.

Stakeholder Surveys/Interviews

We will host small gatherings of 10-15 specially invited stakeholders who will respond to questions designed in collaboration with the State Department that will help inform an actionable strategic plan. These groups will consist of board members, educators, policymakers, students, and community members. We utilize an open-ended question format to analyze from the participants' perspective instead of relying on predetermined responses. The answers to these questions will inform the strategy and performance scorecard development. We can also provide an online survey if more stakeholder engagement is needed following the focus groups.

Strategy Development

Activities

1. Mission and Vision Review: Facilitate discussions with leadership to revisit or reaffirm the organization's mission, vision, and core values.
2. Goal Setting: Establish long-term strategic goals based on collected data, stakeholder input, and the organization's vision.
3. Strategy Formulation: Develop key strategies and initiatives that address identified needs and opportunities, including those related to educational outcomes, workforce readiness, and technology integration.

Mission and Vision Review

Our team will facilitate structured discussions with leadership to revisit and reaffirm the organization's mission, vision, and core values. Through interactive sessions and strategic conversations, we will engage key stakeholders in meaningful dialogue to ensure alignment with current goals and future aspirations. Using proven facilitation techniques, we will guide the leadership team in refining these foundational elements, fostering a shared commitment that drives organizational success. Our goal is to foster a unified, shared commitment to the organization's core purpose, empowering leadership to make informed, aligned decisions that drive sustainable success and long-term impact across all levels of the organization.

Goal Setting

Engage2learn employs a comprehensive suite of tools and methodologies to deliver actionable data to the stakeholder team, empowering them to identify and prioritize three to five high-leverage goals. Through a collaborative, data-driven approach, we will facilitate a process where key stakeholders engage in a thorough analysis of MDE's mission, vision, performance data, and stakeholder feedback. This collective analysis will serve as the foundation for shaping well-informed, strategic goals that reflect the needs and aspirations of the state's education system.

Additionally, we will conduct a thorough review of relevant state documents, including the most recent strategic plan and other foundational resources, ensuring that our proposed goals and strategies are fully aligned with MDE's established vision and objectives. By synthesizing both qualitative and quantitative data, we aim to develop a cohesive and strategic roadmap that not only addresses current challenges but also sets a clear, actionable path forward for continued success and growth in Mississippi's education system.

Strategy Formulation

Engage2learn facilitators will work closely with the stakeholder team to conduct comprehensive research and foster collaboration in order to develop and strategically sequence actionable initiatives and strategies that align with the organization's long-term goals. This process will involve an in-depth analysis of key areas such as educational outcomes, workforce readiness, and technology integration, ensuring that all strategies are tailored to meet both immediate and future needs. Facilitators will guide the team through data-driven decision-making, helping prioritize initiatives that maximize impact and align with the evolving demands of the education system. Through this iterative and thoughtful approach, the team will be equipped with a clear, actionable roadmap for achieving sustainable, transformative results across all key areas.

Below is an example of strategies and initiatives aligned to a strategic goal¹:

Goal 1: We will design and implement systems that provide the necessary structure, support and tools to ensure that staff and students achieve individual growth.

Key Strategies/Initiatives:

- Develop and implement a system to house goals and evidence towards goals as well as tools for progress measurement, including identifying platform(s), training, and guidelines for usage.
- Develop and communicate timelines and methods for establishing and monitoring goals and next steps with auxiliary supports to celebrate and promote growth.

Performance Scorecard Development

Activities

1. KPI Identification: Develop Key Performance Indicators (KPIs) for each strategic goal, ensuring they are measurable and aligned with the organization's mission.
2. Scorecard Design: Create a performance scorecard that visually tracks progress toward strategic goals. The scorecard should include metrics, targets, timelines, and responsibilities for monitoring and reporting.
3. Data Collection Mechanisms: Identify or create systems for ongoing data collection to measure the effectiveness of strategies and track KPIs.

¹ [Sample Goals and Strategies](#)

KPI Identification

Once the team has defined the goals and strategies, engage2learn facilitators will convene staff in work sessions to develop key performance indicators (KPIs) that align with department plans and priorities. These KPIs will align with specific action steps, timelines, responsible parties, and evidence of progress, ensuring that the plan is actionable and designed to deliver on the identified goals. As KPIs are monitored, stakeholders are given insight into and analysis of the progress of implementation.

Scorecard Design

Engage2learn facilitators will guide stakeholders in designing a visual Performance Scorecard² that captures specific, multiple measures determined in collaboration with stakeholders, along with timelines and responsible parties. We utilize a dashboard workspace³ to help stakeholders identify metrics. The categories of metrics may include student outcomes, educator effectiveness, financial stewardship, and operational efficiency. The design of the scorecard will take into account publishing the scorecard in a clear, accessible format.

Data Collection Mechanisms

We leverage our proprietary GroweLab platform for comprehensive data collection and analysis. As part of our process, we can seamlessly integrate MAP data into the platform, ensuring a more complete dataset. Our reporting system operates in real-time, delivering the most current and actionable insights. Additionally, our internal team offers advanced data analysis support to enhance decision-making. Because our platform is fully customizable, we can tailor its features to align with specific department and project requirements, ensuring maximum flexibility and effectiveness.

Stakeholder Engagement and Workshops

Deliverable(s): Stakeholder Engagement Plan

Activities

1. Stakeholder Workshops: Facilitate workshops with board members, educators, and community leaders to gather feedback on the draft strategic plan and performance scorecard.
2. Engagement Plan: Develop a stakeholder engagement plan to ensure continued involvement throughout the process, from strategy formulation to final approval.

² [Sample Scorecard](#)

³ [Sample Dashboard Workspace](#)

3. **Feedback Incorporation:** Revise the strategic plan and scorecard based on stakeholder input and feedback received during workshops.

Stakeholder Workshops

Engage2learn will conduct comprehensive stakeholder workshops to review and refine the draft strategic plan and performance scorecard. These workshops will provide a structured forum for stakeholders to engage in meaningful discussions, ensuring their insights translate into actionable improvements. Utilizing a research-based critique protocol, we systematically identify key strengths, pinpoint areas for enhancement, and foster collaborative problem-solving. This process ensures that stakeholder feedback is both strategic and impactful, driving continuous improvement and alignment with organizational goals.

Engagement Plan

To engage stakeholders, we will collaboratively develop a stakeholder engagement plan to maintain open and transparent communication with all stakeholders. The plan will provide regular updates to stakeholders on progress, achievements, and challenges through diverse communication channels. We utilize change management protocols to anticipate and address resistance to change among stakeholders. We will include a change management plan to ensure a smooth transition to new processes or systems and provide training and support to help stakeholders adapt to changes effectively.

Feedback Incorporation

Engage2learn facilitators will lead the group in coming to an agreement on key recommendations, ensuring alignment with the overarching goals. The team will collaborate on creating an actionable plan to implement necessary revisions while preserving the integrity and original intent of the strategic plan and scorecard drafts.

Drafting and Finalizing the Strategic Plan

Deliverable(s):

- **Draft Strategic Plan and Performance Scorecard**
- **Final Strategic Plan and Performance Scorecard**

Activities

1. **Draft Strategic Plan:** Develop a detailed draft of the strategic plan that includes the mission, vision, strategic goals, key initiatives, and performance scorecard.

2. Review and Revision: Present the draft to the leadership team for review and make necessary revisions based on feedback.
3. Final Strategic Plan: Finalize the strategic plan, ensuring it is a clear, actionable document that includes timelines, responsible parties, and measures for ongoing evaluation.

Draft Strategic Plan

Engage2Learn will systematically gather, analyze, and synthesize all data from the process to develop a comprehensive initial draft of the strategic plan. This draft will encompass a clearly defined mission and vision, strategic goals aligned with organizational priorities, key initiatives designed to drive measurable impact, and a performance scorecard to track progress and ensure accountability.

Review and Revision

Engage2learn will present the draft strategic plan to the leadership team for a comprehensive review, facilitating an in-depth discussion to assess alignment with organizational goals and priorities. Based on the team's feedback, Engage2learn will refine and enhance the plan, ensuring it reflects key insights, addresses potential gaps, and incorporates strategic improvements before finalization.

Final Strategic Plan

Engage2learn will finalize the strategic plan by incorporating comprehensive feedback and necessary revisions to ensure alignment with organizational goals. The finalized plan will be clear, actionable, and structured with well-defined timelines, designated responsible parties, and measurable benchmarks for ongoing evaluation and continuous improvement.

Final Presentation and Handover

Deliverable(s): Final Presentation and Training

Activities

1. Presentation to the Board: Present the final strategic plan and performance scorecard to the board for approval.
2. Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.

3. **Training Session:** Conduct a training session for staff on how to use and monitor the performance scorecard to ensure proper implementation.

Presentation to the Board

Our team will host a Board training workshop to collaboratively present the final strategic plan to the Board, ensuring a comprehensive review and providing an opportunity for meaningful input and feedback.

Documentation Handover

Engage2Learn will compile and deliver a comprehensive package of all project documents, including the finalized strategic plan, performance scorecard, implementation roadmap, and monitoring plan. These materials will be provided to MDE in both electronic and professionally printed formats, ensuring accessibility, clarity, and ease of use for all stakeholders.

Training Session

Engage2Learn will lead a comprehensive training session on effectively utilizing and monitoring the performance scorecard. This session will include in-depth training on our GroweLab platform, equipping participants with the skills to track progress, generate reports, and ensure fidelity of implementation. Through hands-on practice and expert guidance, attendees will gain the necessary knowledge to optimize performance monitoring and data-driven decision-making.

Implementation and Monitoring Plan

Deliverable(s):

- **Implementation Roadmap**
- **Monitoring and Reporting Protocols**

Activities

1. **Implementation Roadmap:** Develop a roadmap that outlines the steps needed to implement the strategic plan, including timelines, resources, and responsibilities.
2. **Monitoring and Reporting Mechanism:** Create a process for regularly monitoring progress on the strategic plan and scorecard, including tools for tracking KPIs and reporting results to stakeholders.
3. **Review and Adjustment Protocol:** Establish a protocol for reviewing and adjusting the strategic plan and performance scorecard as needed to respond to changing conditions or emerging challenges.

Implementation Roadmap

Engage2Learn will collaborate with stakeholders to design a comprehensive implementation roadmap tailored to their specific needs and objectives. This roadmap will be structured within GroweLab, providing clear timelines, allocated resources, and defined responsibilities to ensure accountability and progress. GroweLab’s dynamic platform offers stakeholders a multi-tiered view of data, ranging from high-level strategic insights to detailed, real-time progress monitoring. By leveraging these insights, stakeholders can make informed decisions and track the effectiveness of initiatives. Below is an example of how a goal and its associated strategies might be structured within GroweLab.

The screenshot displays the 'Implementation Plan' interface in GroweLab. It features a sidebar with navigation options like Dashboard, Calendar, Portfolio, Resources, Sessions, Reporting, Plan, Settings, Help, and Leader. The main content area shows a 'Plan Dashboard' with 'Plan Details' selected. A search bar and user avatars are at the top right. A '+ Create a Goal' button is present. The primary goal is 'Goal: Teaching & Learning', which is 'On Track' and has 20% progress. Below this goal is a table of specific results:

Specific Result	Status	Progress	Year	Department	Assignee	Due Date
1.1 Assess the current teaching and learning environment through the Learning by Design framework.	Complete	100%	23-24	Teaching & Learning	Jettie Wyman	Mar 27, 2024
1.2 Create student experiences that leverage evolving technologies to construct new learnings.	On Track	45%	23-24	Teaching & Learning	Jettie Wyman	Apr 30, 2024
1.3 Design, monitor, and evaluate the implementation of the technology-enhanced curriculum at the campus level.	On Track	75%	24-25	Teaching & Learning	Jettie Wyman	Dec 1, 2024
1.3.1 Establish consistent reporting and monitoring systems to track progress and target needed resources/supports/intervention.	Complete				Gilbert Bins	Dec 1, 2024
1.3.2 Equip/calibrate campus and central office instructional leadership to use rubric and coach teachers.	On Track				Crystal Saldierma	Dec 1, 2024
+ Add Action Item						
1.4 Establish and standardize the process for selecting and evaluating appropriate technology related instructional programs (software and hardware (devices)) at both the campus and district level.	On Track	60%	24-25	Teaching & Learning	Fausto Swift	Mar 15, 2025
1.5 Scale libraries to ensure current technology and resources to support the technology-enhanced curriculum.	Not Started	0%	25-26	Teaching & Learning	Fausto Swift	Jan 1, 2026
1.6 Provide 24/7 access to learning through a district-wide learning management system to support teaching and learning.	Not Started	0%	25-26	Teaching & Learning	Fausto Swift	Feb 28, 2026
+ Add Specific Result						

Below the table is a second goal: 'Goal: Leadership & Instructional Support', which is 'At Risk' and has 0% progress.

Monitoring and Reporting Mechanism

For monitoring and reporting, we utilize GroweLab to provide clear results of progress and impact. We understand the importance of transparent communication and we will collaborate with the State Department in developing comprehensive reports that articulate the department’s journey toward achieving its goals, progress, successes, challenges, strategies, and future directions. We will provide leaders with an easy-to-access dashboard that highlights progress on all strategic priorities and aligned data.

Below is an example of a Strategic Planning Dashboard in GroweLab with a high-level overview of project status and activities



Review and Adjustment Protocol

The dashboard in GroweLab communicates plan progress, highlights at-risk items, and provides a feed of activity so you can be confident in your plan implementation. We will include quarterly virtual check-ins with stakeholders to review and make adjustments as needed. We can easily adjust the strategic plan and scorecard as needed to accommodate changing conditions or emerging challenges. This includes updating language and data in GroweLab to immediately reflect changes and provide the most updated information. We utilize the following protocols to review and recommend adjustments accordingly:

Execution: Monitor progress regularly to ensure tasks are completed on time and within budget. Address any issues or obstacles that arise. Keep stakeholders informed.

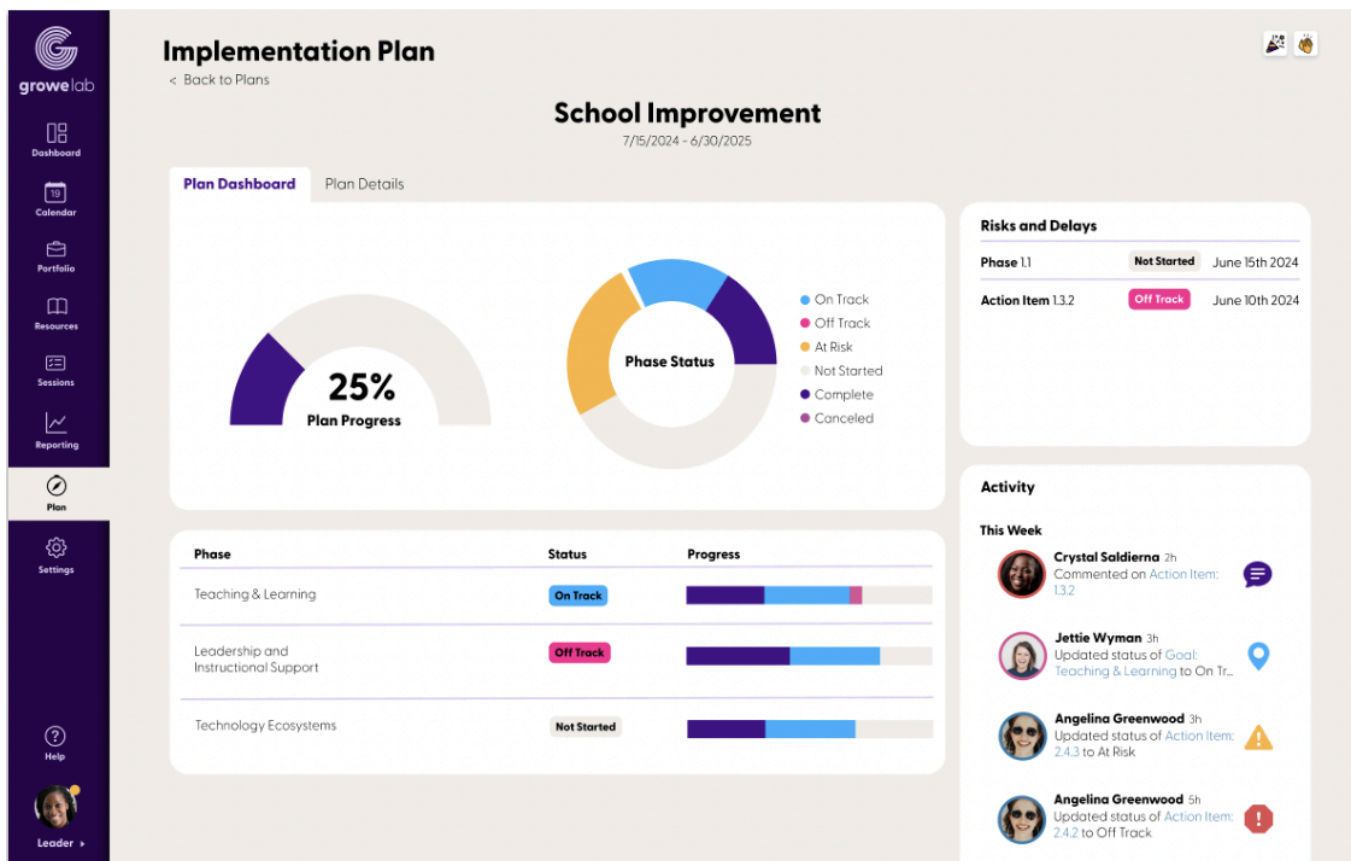
Monitoring and Control: Track key performance indicators. Compare actual progress against the project plan and adjust as needed. Regularly meet to discuss progress, address concerns, and make decisions.

Risk Management: Continuously assess and manage risks throughout the lifecycle. Identify new risks that may arise and adjust mitigation strategies accordingly.

Closure: Evaluate the initiative's overall success in achieving its objectives. Document lessons learned, including what worked well and areas for improvement. Celebrate the achievements of the initiative and acknowledge the contributions of the project team and stakeholders.

We firmly believe strategic planning and performance scorecards are ongoing processes, not one-time events. Engage2learn systems empower departments to continuously review and adapt their strategies in response to changing circumstances and opportunities.

Below is an example of a dashboard in GroweLab showing areas where the project is at risk and which action items need to be addressed.








Component 2 - Administration

Tab 2 - Resumes for Key Personnel

Key Personnel

The following personnel have been selected for this project. All key personnel assigned to this project possess the necessary qualifications to successfully support MDE in developing a customized strategic plan and performance scorecard. Our team includes experienced professionals who have managed similar strategic projects, demonstrating strong organizational and communication skills. Each member has a proven track record in strategic planning within the education sector, ensuring a deep understanding of industry-specific challenges and solutions. Additionally, our staff brings expertise in data analysis, KPI development, and performance tracking systems to drive informed decision-making. Our team is adept at engaging diverse stakeholders, facilitating collaboration, and ensuring alignment with strategic goals. Finally, our personnel possess excellent professional writing and editing skills, ensuring that all final documents are clear, precise, and impactful. See key personnel resumes following this table for more detailed information.

Staff Member	Years' K-12 Experience	Role/Responsibilities	Education
 <p>Kammi Green Chief of Partner Success</p>	21	<p><i>Collaborates with the Executive Directors of Partner Success and district leaders to ensure project success.</i></p>	<p>Master of Education Educational Administration</p> <p>Bachelor of Science Interdisciplinary Studies</p>
 <p>Jentessa Williams Executive Director of Partner Success</p>	16	Project Lead	<p>Master of Education Educational Leadership</p> <p>Bachelor of Science Mathematics</p>
 <p>Leah Beard Certified e2L Data-Informed Growth Coach</p>	19	Strategic Planning Facilitator	<p>Master of Arts Organizational Psychology</p>
 <p>Mareka Austin Certified e2L Data-Informed Growth Coach</p>	14	Strategic Planning Facilitator	<p>Master of Education Educational Leadership</p> <p>Master of Business Business Administration</p>
 <p>Janet Mobley Director of Partner Success</p>	36	Strategic Planning Facilitator	<p>Master of Education Educational Administration</p>

 <p>Julie Moynihan <i>Certified e2L Data-Informed Growth Coach</i></p>	<p>14</p>	<p>Strategic Planning Facilitator</p>	<p>Master of Education Educational Leadership and Policy Studies</p>
 <p>Travis Whisenant <i>Certified e2L Data-Informed Growth Coach</i></p>	<p>28</p>	<p>Strategic Planning Facilitator</p>	<p>Master of Science Educational Administration</p>
 <p>Crystal Cross, Ed.D. <i>Certified e2L Data-Informed Growth Coach</i></p>	<p>25</p>	<p>Strategic Planning Facilitator</p>	<p>Doctor of Education K-12 Educational Leadership Master of Education Administration & Supervision</p>
 <p>Sandra Brunet <i>Certified e2L Data-Informed Growth Coach</i></p>	<p>23</p>	<p>Strategic Planning Facilitator</p>	<p>Master of Arts Educational Leadership Policy Studies</p>



Kammi Green

Chief of Partner Success

kammi@engage2learn.org • @GreenKammi

K-12 Experience:

23 YEARS

Kammi's Why

Kammi believes every student deserves the opportunity to learn in an environment where they can thrive and own their future. Through her work at e2L, she wants to make public schools the choice for all students by creating life ready students through the modernized learning experiences and systems we help leaders, coaches, and teachers put into practice. When we create life-ready students, they get the chance to take the path of their choice.

Education

Master of Education:
Educational Administration
Texas A&M University

Bachelor of Science:
Interdisciplinary Studies w/
Math Minor
Texas A&M University

Certifications

Texas:
Superintendent
Principal
Elementary Self Contained

Other Certifications
Apple Teacher Certified
Google Certified Trainer

Location:
College Station, TX

Key e2L Projects

- ⦿ **Chief of Partner Success**
Responsible for the oversight and function of the Partner Success Program. Contributes to new business development through correspondence, presentations, and interviews. Uses project mapping process to assign coaches to projects and build a training and coaching schedule in conjunction with the district project lead. Supports current and future business needs through successful implementation of projects.

Areas of Expertise

- ⦿ **District & Campus Administration • Bryan ISD**
Implemented K-12 guaranteed and viable curriculum, design a K-12 RTI program, and facilitated the growth of instructional coaches to support teachers in implementing researched based best practices
- ⦿ **Curriculum & Instruction • Anderson-Shiro CISD**
Served as Director of Curriculum and Instruction for several years before becoming the Executive Director of Instruction and Accountability and then as Assistant Superintendent and Interim Superintendent

Work Experience

- ⦿ **Chief of Partner Success** 2021-Present
engage2learn
- ⦿ **Executive Director of Partner Success** 2017-2021
engage2learn
- ⦿ **e2L Certified eGrowe Coach** 2015-2017
engage2learn
- ⦿ **Director of Curriculum & Instruction** 2014-2015
Bryan ISD
- ⦿ **Director of Curriculum & Instruction • Executive Director of Instruction & Accountability • Assistant Superintendent • Interim Superintendent** 2008-2014
Anderson-Shiro CISD
- ⦿ **Professional Development Specialist** 2005-2008
Bryan ISD





Jentessa Williams

Executive Director of Partner Success

jentessa@engage2learn.org • @JentessaW

K-12 Experience:

16 YEARS

Key e2L Projects

- Executive Director of Partner Success**
 Collaborates with campus, district, and state agency leaders to design and coordinate training and coaching and exercises principles of project management to ensure successful project implementation. In these roles, she guides stakeholders in reaching solutions, achieving success criteria, building internal capacity, and fueling equity, growth, and engagement in public schools.

Areas of Expertise

- Executive Director of Partner Success • engage2learn**
 Served a variety of large urban districts, state-level agency grants, district-wide school improvement efforts, multilingual efforts, and strategic design efforts in multiple states.
- Assistant Principal • Fort Worth ISD**
 Facilitated monthly meetings with intervention teams, designed and implemented protocol for further evaluations, attended yearly MTSS district training and meetings, designed Google based website to house MTSS information for staff, and designed and implemented progress monitor tracking for campus-wide implementation.
- HQIM / HQCM Planning and Implementation**
 Partner with LEAs to provide support for Planning and Implementation phases of HQIM / HQCM. TEA Certifications: SFP Diagnostic.

Work Experience

- Executive Director of Partner Success** 2022-Present
 engage2learn
- e2L Certified eGrowe Coach** 2021-2022
 engage2learn
- Assistant Principal** 2020-2021
 Fort Worth ISD
- RTI/MTSS and 504 Facilitator** 2016-2021
 Fort Worth ISD
- Data Analyst/Campus Testing Coordinator** 2014-2015
 Fort Worth ISD
- Data Analyst/Campus Testing Coordinator** 2006-2014
 Fort Worth ISD

Jentessa's Why

All students deserve to have a quality education and all teachers deserve to feel supported in their growth. As an EDPS, Jentessa wants to impact as many students as possible.

Education

Master of Education:
 Educational Leadership
 Texas Christian University

Bachelor of Science:
 Mathematics
 Jackson State University

Certifications

Apple Teacher Certified

Google Educator - Level 1 Certified

Texas:

Principal (EC-12)

Mathematics (8-12)





Leah Beard

Executive Director of Partner Success

leah@engage2learn.org • @l_beard

K-12 Experience:

19 YEARS

Leah's Why

Leah is driven to improve and transform education systems to create the greatest opportunities and conditions possible for their students and communities.

Education

Master of Arts

Organizational Psychology with a Specialization in Change Leadership
Columbia University, Teachers College

Bachelor of Arts

History (Minor in Russian)
Texas A&M University

Teacher Certification

University of North Texas

Certifications

Texas Standard Teaching Certificates:
History (8-12)
Composite Social Studies (8-12)
Generalist (4-8)

Location:

Fort Stockton, TX



Key e2L Projects

- **Executive Director of Partner Success**
Partners with school, district, and state agency leaders to identify critical opportunities, design effective strategies, and develop comprehensive implementation plans while exercising principles of project management to ensure success criteria is achieved. In these roles, she guides stakeholders in reaching solutions, building internal capacity, and fueling equity, growth, and engagement in public schools.

Areas of Expertise

- **Organizational Development, Change Leadership & Strategic Planning • e2L, ESC Region 11, Keller ISD Administration**
Long-range, key strategic, and annual planning processes focused on transformation, improvement, and innovation at the system, school, and team levels; Community-based committees to ensure inclusion of stakeholder voice in change initiatives
- **Curriculum Design & Instructional Leadership • e2L, Keller ISD, & Liberty Christian School Administration**
Curriculum systems and professional learning to enhance both student and educator growth in alignment with organizational goals
- **HQIM / HQCM Planning and Implementation**
Partner with LEAs to provide support for Planning and Implementation phases of HQIM / HQCM. TEA Certifications: SFP Diagnostic.

Work Experience

- **Executive Director of Partner Success** | engage2learn 2022-Present
Supervisor: Kammi Green, Chief of Partner Success
- **Certified eGrove Coach and Learning Designer** 2021-2022
engage2learn
- **Organizational Effectiveness Specialist** 2020-2021
ESC Region 11
- **Vice President of Academics** 2018-2020
Liberty Christian School
- **Director of Organizational Improvement & Strategic Planning** 2016-2018
Keller ISD Administration
- **Learning Coordinator, K-12 Curriculum & Instruction** 2013-2016
Keller ISD Administration



Mareka Austin

Certified e2L Data-Informed Growth Coach

marek.austina@engage2learn.org · @Mareka_Austin

K-12 Experience:

14 YEARS

Areas of Expertise:

School Turnaround, Math Curriculum, Positive Behavior Interventions & Supports, Diversity, Equity, Inclusion & Belonging

e2L Experience -

- Resilient Schools Support Program | Various Districts**
 Serves as a Coach, Implementation Advisor and Product Advisor to build capacity in instructional best practices and to optimize student outcomes. Develops customized resources to suit the needs of all stakeholders and support professional growth at varying levels of implementation and learning.
- Executive Coaching | Various Districts**
 Provides coaching to district and campus leaders by using the e2L eGrowe® Coaching Model. Guides executive-level leaders and principals through professional development that results in a high-performance campus culture.
- Math Lead | engage2learn**
 Facilitate continuous math learning and support internally and externally.

Areas of Expertise

- Area of Expertise - School Turnaround • ECISD**
 As principal, I led the school from a 5-year "F" rating to "C" rating.
- Area of Expertise - PBIS Implementation • Arlington ISD**
 Implemented school-wide and classroom-wide Positive Behavior Interventions & Supports for over 3500 students and 200 staff
- HQIM / HQCM Planning and Implementation**
 Partner with LEAs to provide support for Planning and Implementation phases of HQIM / HQCM. TEA Certifications: Implementation Advisor, Product Advisor (Eureka, Carnegie), SFP Management, SFP Framework, SFP Diagnostic, RBIS (Math, Literacy)

Work Experience

- Certified e2L Data-Informed Growth Coach** 2022-Present
 engage2learn
- Principal** 2018 - 2022
 Castleberry ISD and ECISD
- Secondary Math Curriculum Coordinator** 2016 - 2018
 Castleberry ISD
- Assistant Principal** 2013 - 2016
 Arlington ISD
- Math Teacher** 2010 - 2013
 Arlington ISD

Mareka's Why

Everyday, I wake up to educate, encourage, and empower those within my reach and beyond. I strongly believe that every student deserves equitable, relevant and unique learning experiences and that educators are the catalyst for these experiences.

Education

Doctoral Candidate, 2025

Educational Leadership
 Tarleton State University

Master of Education, 2012

Educational Leadership
 Dallas Baptist University

Master of Business, 2012

Business Administration
 Dallas Baptist University

Bachelor of Business Administration, 2003

Finance
 University of Central Arkansas

Certifications

Texas:

Principal EC-12
 Generalist 4-8
 Special Education
 English as a Second Language
 Supplemental 4-8





Janet Mobley

Certified e2L Data-Informed Growth Coach

janet@engage2learn.org • @JanetMobley18

K-12 Experience:

36 YEARS

e2L Experience

- Director of Talent Development**
 Provides support for e2L coaches through coaching conversations, calibrations, and training along with assisting the Partner Success team with learning design and project implementation
- Executive Coaching | Abilene ISD, El Paso ISD, Hawley ISD, Winters ISD**
 Provides coaching to district and campus leaders by using the e2L Growe[®] Coaching Model. Guides executive-level leaders and principals through professional development that results in a high-performance campus culture.
- Coaches Academy Coaching | Pampa ISD, Hawley ISD**
 Provides coaching to district instructional coaches using the e2L Growe[®] Coaching Model to increase knowledge of classroom pedagogy. Develops customized resources to suit the needs of all coachees to support professional growth in mastery-based learning.

Areas of Expertise

- Campus Administration • Denison ISD**
 Successful oversight of a PK-4th grade as the lead administrator. Campuses met Standard from 2014-2020.
- Gifted and Talented Education • Denison ISD**
 Designed and facilitated gifted education at the elementary level.
- HQIM / HQCM Planning and Implementation**
 Partner with LEAs to provide support for Planning and Implementation phases of HQIM / HQCM. TEA Certifications: Implementation Advisor, SFP Framework, SFP Diagnostic

Work Experience

- Director of Talent Development** 2021-2024
 engage2learn
- Certified e2L Data-Informed Growth Coach** 2018-present
 engage2learn
- Campus Principal** 2005-2018
 Denison ISD
- Curriculum Coordinator** 2003-2005
 Denison ISD
- Gifted and Talented** 1996-2005
 Denison ISD
- Classroom Teacher** 1988-1996
 Birdville ISD, Irving ISD, and Denison ISD

Janet Mobley's Why

Janet believes that public education is one of our nation's greatest achievements. Her passion is to help educators provide authentic learning for all students and to prepare them with life-ready skills needed to be successful, contributing citizens. Through coaching, educators are able to receive the support needed at the campus level to powerfully impact adult and student learning.

Education

Master of Education

Educational Administration
 University of North Texas

Bachelor of Science

Education/English
 Baylor University

Certifications

Texas:

Elementary (1-8)
 Principal (EC-12)

Other Certifications:

Strong Foundations - Implementation and Product Advisor
 Google Educator - Level 2 Certified
 Apple Teacher Certified





Julie Moynihan

Certified e2L Data-Informed Growth Coach

julie@engage2learn.org • @jdmoynihn

K-12 Experience:

17 YEARS

e2L Experience

- Teacher Coaching | Arlington ISD, Boone County Schools, Dallas ISD**
 Coaches teachers to build their capacity in instructional best practices and increase knowledge of classroom pedagogy for blended learning by using the e2L eGrowe® Coaching Model. Develops customized resources to suit the needs of all coachees and supports professional growth at varying levels of implementation and learning.
- Coaches Academy Coaching | Abilene ISD, Boone County Schools, Harlingen ISD**
 Provides coaching to district instructional coaches using the e2L eGrowe® Coaching Model to increase knowledge of classroom pedagogy for blended learning including both online and teacher-facilitated instruction. Develops customized resources to suit the needs of all coachees to support professional growth in mastery-based learning.
- Executive Coaching | Boone County Schools, Dallas ISD, Midland ISD, Pawnee ISD**
 Provides coaching to district and campus leaders by using the e2L eGrowe® Coaching Model. Guides executive-level leaders and principals through professional development that results in a high-performance campus culture.

Areas of Expertise

- Turnaround School Leader • Fort Worth ISD**
 Transformed historically underperforming Title 1 campus to meet state accountability standards by implementing high-leverage strategies that significantly turned around and improved the campus culture, climate, and academic outcomes for all students of a diverse school community. Cultivated and increased the teaching quality of staff through high-quality professional learning, coaching, and effective observation and feedback.
- HQIM / HQCM Planning and Implementation**
 Partner with LEAs to provide support for Planning and Implementation phases of HQIM / HQCM. TEA Certifications: Implementation Advisor

Work Experience

- Certified e2L Data-Informed Growth Coach** 2021-Present
 engage2learn
- Principal** 2016-2021
 Fort Worth ISD
- Assistant Principal** 2013-2016
 Fort Worth ISD
- Data Analyst** 2012-2013
 Fort Worth ISD
- Teacher** 2007-2012
 Fort Worth ISD

Julie's Why

I believe that everyone is wonderfully made for a purpose and as educators, we are in a unique position to be the first point of entry to help students attain their purpose by preparing them with life ready skills for college and career.

Education

Master of Education:
 Educational Leadership and Policy Studies
 University of Texas at Arlington

Bachelor of Arts:
 Political Science
 Wichita State University

Certifications

Texas:
 EC-6 Generalist
 4-8 Generalist
 EC-12 Principal
 ESL

Internal e2L Training:
 DEIB Training

Other Certifications:
 SF Implementation Advisor
 Google Educator - Level 1 Certified
 STR Certified
 Certificate in School Management and Leadership - Harvard University





Travis Whisenant

Certified e2L Data-Informed Growth Coach

travis@engage2learn.org • @TravisWhisenant

K-12 Experience:

29 YEARS

Travis' Why

Teachers have the biggest impact on a student's success and principals have the biggest impact on a campus' success. Growing teachers' and principals' capacity to serve students is the best investment we can make toward ensuring the success of every child.

Education

Master of Science

Educational Administration
University of North Texas

Bachelor of Science

Interdisciplinary Studies
Abilene Christian University

Certifications

Texas:

Principal, EC-12
Secondary Social Studies
Composite, 6-12
Secondary English Language
Arts, 6-12
Secondary English, 6-12
ESL Supplemental (EC-12)
Special Education
Supplemental (6-12)

Other Certifications:

Lone Star Governance Coach
T-PESS Trainer of Trainers
T-TESS Trainer of Trainers
AEL Trainer of Trainers
ESF Diagnostic Facilitator

e2L Experience

- Strategic Design | Dripping Springs ISD, Newark USD, El Segundo SD**
Facilitated the strategic design of district innovation plans, including: 5-year strategic plans, cultural competencies, and district AI implementation.
- School Improvement | Elgin ISD, Zapata ISD, Abilene ISD**
Provided coaching support for implementation of Targeted Improvement Plans to improve student outcomes.
- Executive Coaching | Dallas ISD, Clark County SD**
Provides coaching to district and campus leaders by using the e2L eGrove[®] Coaching Model. Guides executive-level leaders and principals through professional development that results in a high-performance campus culture.

Areas of Expertise

- School Board Training and Coaching**
Certified by Texas to provide coaching and support to school governing teams; including team-building and the design and monitoring of student outcome goals.
- School Improvement**
Facilitated campus diagnostic process, designed targeted Improvement plans, and aligned capacity builders to prioritize actions that improve student outcomes.
- Executive Coaching**
Provided coaching and support to campus and district administrators to facilitate growth in professional practice and student outcomes.
- HQIM / HQCM Planning and Implementation**
Partner with LEAs to provide support for Planning and Implementation phases of HQIM / HQCM. TEA Certifications: Implementation Advisor, SFP Management, SFP Framework, SFP Diagnostic, RBIS (Math, Literacy).

Work Experience

- Certified e2L Data-Informed Growth Coach** 2022-Present
engage2learn
- Director of Leadership and Support** 2019-2022
Educational Service Center Region 11
- Principal, Assistant Superintendent** 2008-2019
Bridgeport Middle School/Bridgeport ISD





Crystal Cross, Ed.D. Certified e2L Data-Informed Growth Coach

Crystal@engage2learn.org • @CrossEducator

K-12 Experience:

27 YEARS

e2L Experience

- Coaches Academy Coaching | Arlington ISD, Dallas ISD, Houston ISD**
 Provides coaching to district instructional coaches using the e2L eGrove® Coaching Model to increase knowledge of classroom pedagogy for blended learning including both online and teacher-facilitated instruction. Develops customized resources to suit the needs of all coachees to support professional growth in mastery-based learning.
- Growth Catalyst Coaching | Dallas ISD, El Paso ISD, Houston ISD, Kentucky Department of Education**
 Provides coaching to district leaders by using the e2L eGrove® Coaching Model. Guides executive-level leaders through professional development that results in a high performance campus culture.
- Executive Coaching | Arlington ISD, Dallas ISD, El Paso ISD, Forney ISD, Fort Worth ISD, Memphis Shelby County Schools, Clark County School District**
 Provides coaching to district and campus leaders by using the e2L eGrove® Coaching Model. Guides executive-level leaders and principals through professional development that results in a high performance campus culture.

Areas of Expertise

- Leadership • e2L, Duncanville ISD, Alief ISD**
 Educational leadership doctoral work was centered on executive coaching. Collaborated with and coached district and campus leaders through work with e2L and school districts.
- Professional Development • Duncanville ISD, Rockwall ISD**
 Supported the professional learning of campus and district educators from elementary through secondary levels.
- HQIM / HQCM Planning and Implementation**
 Partner with LEAs to provide support for Planning and Implementation phases of HQIM / HQCM. TEA Certifications: Implementation Advisor, SFP Management, SFP Framework, SFP Diagnostic, RBIS (Literacy)

Work Experience

- Certified e2L Data-Informed Growth Coach** 2017-Present
 engage2learn
- Director of Professional Development** 2016-2017
 Duncanville ISD
- Campus Principal** 2011-2016
 Duncanville ISD
- Title I Instruction Facilitator** 2009-2011
 Rockwall ISD
- Assistant Principal** 2001-2009
 Alief ISD

Crystal's Why

Every child deserves a quality education, and Crystal wants to fully support this effort by partnering with educators and leaders who are striving to create the best learning environments for all students.

Education

Doctor of Education

K-12 Educational Leadership
 Dallas Baptist University

Master of Education

Administration & Supervision
 University of Houston-Victoria

Bachelor of Science

Interdisciplinary Studies
 Texas State University

Certifications

Texas:

Texas Superintendent (EC-12)
 Texas Principal (EC-12)
 Elementary Self-Contained (Grades 1-8)
 English as a Second Language Supplemental
 Elementary Mathematics (Grades 1-8)





Sandra Brunet

Certified e2L Data-Informed Growth Coach

sandra@engage2learn.org • @SBrunet0608

K-12 Experience:

23 YEARS

Sandra's Why

To ensure every student in the US has access to quality and rigorous curriculum and a stable school environment that honors celebrates and elevates students' worth.

Education

Master of Arts

Educational Leadership/ Policy
California State - Northridge

Bachelor of Arts

Communication, UCLA

Certifications

Florida:

Educational Leadership (ESOL admin add on)
Elementary Education
Special Education

Publications:

Leading with Administrator Clarity, Ulysses Press, 6-22
The Formative Assessment Handbook, Wiley, 12-23

Other Certifications:

Google Educator
CLAD (Cross Language and Acquisition Development Certification)
Systematic ELD
Outstanding Co-Administrator (Association of California School Administrators)
School Retool
Design Thinking
Leading Schools of the Future- Presenter

Location:

Panama City Beach, FL



e2L Experience

- Executive & Coaches Academy Coaching | Kentucky Department of Education**
 Provides coaching to district instructional coaches using the e2L eGrove® Coaching Model to increase knowledge of classroom pedagogy for blended learning, including online and teacher-facilitated instruction. Develops customized resources to suit the needs of all coachees to support professional growth in mastery-based learning.
- Executive Coaching | Los Angeles Unified School District/ Clark County School District**
 Provides coaching to district and campus leaders by using the e2L eGrove® Coaching Model based on Data-Driven Instruction. . Guides executive-level leaders and principals through professional development that results in a high-performance campus culture.

Areas of Expertise

- Blended Learning • Hawaii Technology Academy**
 Collaborated to implement the first-ever soft skills report card and increased student agency in learning as evidenced by a 19% increase in graduation rate over 2 years.
- DEIB**
 Increased student access to honors-level courses by 225% for traditionally marginalized populations, assisted with the HBCU minority recruitment fair and led book studies to increase DEI learning across the county.
- HQIM / HQCM Planning and Implementation**
 Partner with LEAs to provide support for Planning and Implementation phases of HQIM / HQCM. TEA Certifications: Product Advisor (Amplify).

Work Experience

- Certified e2L Data-Informed Growth Coach** 2022-Present
 engage2learn
- Principal** 2019-2021
 St. Johns County School District
- Island Director** 2017-2019
 Hawaii Technology Academy
- Principal** 2013-2017
 Saugus Union School District

Tab 3 - References

Appendix C - References

Client Name	Crowley ISD
Contact Name and Title	Dr. Michael McFarland, Superintendent
Contact Address	512 Peach Street, Crowley, TX 76036
Contact Telephone Number	(817) 297-5800
Email Address	michael.mcfarland@crowley.k12.tx.us
Type of work provided to the client	Strategic Planning, Implementation Roadmap
Effective contract dates for the time frame services were/are being provided to client	2019-2020, 2024-2025

Client Name	College Station ISD
Contact Name and Title	Mike Martindale, Former Superintendent
Contact Address	1812 Welsh, College Station, TX 77840
Contact Telephone Number	(979) 450-6390
Email Address	mmartindale4206@gmail.com
Type of work provided to the client	Strategic Planning, Performance Scorecard
Effective contract dates for the time frame services were/are being provided to client	2022-2023

Client Name	Tempe School District No. 3
Contact Name and Title	Cindy Denton, Director of School Support & Systems
Contact Address	3205 S. Rural Road, Tempe, AZ 85282
Contact Telephone Number	(480) 730-7480
Email Address	cindy.denton@tempeschools.org
Type of work provided to the client	Strategic Planning
Effective contract dates for the time frame services were/are being provided to client	2022-2023

Component 3 - Price

Tab 4 - Price/Budget

Engage2learn will collaborate with MDE leadership to customize services to best meet the department’s needs to exceed the expectations of the strategic plan. Travel fees are included.

Description	Fees
Project Initiation/Planning <ul style="list-style-type: none"> • Deliverable(s) <ul style="list-style-type: none"> ○ Project work plan 	Included in Project Management
Environmental Scan and Data Collection <ul style="list-style-type: none"> • Deliverable(s) <ul style="list-style-type: none"> ○ SWOT Analysis and Environmental Scan Report 	\$44,000
Strategy Development	\$17,720
Performance Scorecard Development	\$4,430
Stakeholder Engagement and Workshops <ul style="list-style-type: none"> • Deliverable(s) <ul style="list-style-type: none"> ○ Stakeholder Engagement Plan 	\$6,930
Drafting and Finalizing the Strategic Plan <ul style="list-style-type: none"> • Deliverable(s) <ul style="list-style-type: none"> ○ Draft Strategic Plan and Performance Scorecard ○ Final Strategic Plan and Performance Scorecard 	\$11,500
Final Presentation and Handover <ul style="list-style-type: none"> • Deliverable(s) <ul style="list-style-type: none"> ○ Final Presentation and Training 	\$9,560
Implementation and Monitoring Plan <ul style="list-style-type: none"> • Deliverable(s) <ul style="list-style-type: none"> ○ Implementation Roadmap ○ Monitoring and Reporting Protocols • GroweLab Licenses <ul style="list-style-type: none"> ○ 25 licenses ○ Onboarding & configuration • Virtual Check-Ins 	\$8,075
Project Management	\$9,640
Total	\$111,855

Component 4 - Other

Tab 5 - Additional Information

Strategic Planning & Implementation Experience

E2L has successfully facilitated and helped implement more than 65 K-12 public education strategic plans. We have included the following cross-section of our partners as examples of our strategic planning experience with various state and local communities.

School District	State	Enrollment	Economic Disadvantage	Caucasian/ White	African American	Latino	Other	ELL
Arlington ISD	TX	59,783	72.8%	19.2%	24.9%	46.6%	9.3%	28.1%
Cincinnati Public Schools	OH	34,635	82%	21.9%	61.7%	8.6%	7.8%	5.9%
Providence Public Schools	RI	23,836	86.8%	6.5%	15%	68%	10.5%	31%
Bibb County Public School	GA	21,373	73.7%	12.1%	77.7%	5.8%	4.3%	2.7%

We invite you to view the final strategic plans and brochures for these partners.

- [Arlington Independent School District Strategic Plan Brochure \(TX\)](#)
- [Cincinnati Public Schools Strategic Plan \(OH\)](#)
- [Providence Public Schools - DeSesto Middle School Strategic Plan Brochure \(RI\)](#)
- [Bibb County Schools Strategic Plan Brochure \(GA\)](#)

State-Level Experience

We have worked with several state agencies and have the capacity to manage projects of this scale.

We are a State Department of Education Approved Vendor with the following state agencies.

 <p>Professional Learning Communities Support</p>	 <p>School Turnaround Services</p>
 <p>Education Related Consulting Services</p>	 <p>PK-12 School Redesign and Strategic Support Services</p>
 <p>School Improvement Services to Address HODOE Priorities, Comprehensive Assistance, Training, and Educational Resources and Services, and PD Services Relating to English Language Learners</p>	 <p>10+ statewide school improvement and HQIM programs</p>
 <p>School Improvement Technical Assistance Partners and Title II-A Related Support Providers</p>	 <p>Independent School Turnaround Experts</p>

e2L + Texas Education Agency

E2L has extensive experience working with districts with large populations of English language learners and special education students. Texas has the second-largest number of English language learners in the nation. We have been a Texas Department of Education-approved provider for over a decade, providing services to 100+ districts across the state. E2L is currently approved for 10 different school improvement and HQIM programs. Because of this, nearly half of our coaching team is comprised of dual-certified ELL/MLL coaches. The following is a list of current TEA projects we support.



<p>Strong Foundations for Math and Literacy HQIM Planning and Implementation <i>2023-Present</i></p>	<p>Supporting LEAs in:</p> <ul style="list-style-type: none"> • Developing a math or literacy instructional framework • Selecting new high-quality instructional materials (HQIM) • Creating district-level systems to manage instruction effectively <p>Providing technical assistance for:</p> <ul style="list-style-type: none"> • High-fidelity implementation of instructional materials • Research-based instructional strategies • High-quality professional learning for teachers, coaches, and administrators <p>18 district partners</p>
<p>Effective Schools Framework Vetted Improvement Program <i>2019-Present</i></p>	<p>Training programs vetted and approved by TEA to support school improvement. This cyclical process includes consistent assessment of current practices, prioritizing gaps in system/practices, capacity building, and ongoing plan implementation support. Sample ESF Implementation Plan</p> <p>11 district partners</p>
<p>School Action Fund (SAF) <i>2019-Present</i></p>	<p>SAF provides customized planning and implementation support to districts committed to bold action to transform low-performing schools through a redesign.</p> <p>15 district partners</p>
<p>Resilient Schools Support Program <i>2021-Present</i></p>	<p>Customized technical assistance to build robust COVID recovery and acceleration plans, implementing continuous improvement cycles. Sample RSSP Workbook</p> <p>36 district partners</p>

Testimonial:

“Throughout my experience working with engage2learn, I have been struck by the level of partnership and alignment their leaders exhibit in making sure that the guidance they are giving to districts is in line with what we at TEA are setting. Their communications are perpetually professional and responsive, and I have leaned on their team as thought partners in program design. They are also consistently on the lookout for what makes the most sense for the LEAs they are supporting, even in cases where changes are not in their financial interest. I am very glad to have engage2learn supporting our LEAs and look forward to continuing to work with them in the future. I extend a warm recommendation to other SEAs looking to utilize engage2learn services.”

-Brian Doran, TEA Director of Expanded Learning Models

Tab 6 - Signed Contingent Fee/Acknowledgement of Amendments

Engage! Learning, LLC

User Actions

[View Filed Documents](#) [Opt-in or Opt-out of Email updates](#) [Print Business Details](#)

Name History

Name	Name Type
Engage! Learning, LLC	Legal

Business Information

Business Type:	Limited Liability Company
Business ID:	1325808
Status:	Good Standing
Effective Date:	02/22/2022
State of Incorporation:	DE
Principal Office Address:	8911 North Capital of Texas Highway, Suite 4200 #1065 Austin, TX 78759

Registered Agent

Name
REGISTERED AGENT SOLUTIONS, INC 8927 Lorraine Rd., Ste. 204-A Gulfport, MS 39503

Officers & Directors

Name	Title
Shannon Buerk 8911 North Capital of Texas Highway, Suite 4200 #1065 Austin, TX 78759	Member



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](https://mdek12.org/procurement/rfp/) at <https://mdek12.org/procurement/rfp/> under MDE Bid **Announcements section**. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

Matt Bachman

Printed Name

February 3, 2025

Date

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

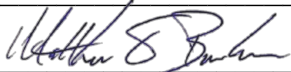
NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Matt Bachman

Title: Chief Financial Officer

Signature: 

Date: February 3, 2025



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

Matt Bachman

Printed Name

February 3, 2025

Date

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

_____ Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

✓
_____ Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Appendix A – Proposal Cover Sheet

Company/Name: _____

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	
Mailing Address	
City, State, Zip	
Telephone:	
E-Mail Address:	

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? ____ YES ____ NO
2. If known, what is your supplier number? _____
3. Are you currently registered with PayMode? ____ YES ____ NO
4. Are you a minority owned company? ____ YES ____ NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: _____ Date: _____



Proposal for Strategic Planning and Performance Scorecard Services

RFP Number: 3120003047

Submitted To:

Mississippi Department of Education (MDE)
Office of Procurement
359 North West Street
Jackson, Mississippi, 39201

Submitted By:

Katalyst Consulting Partners

www.katalystcp.com

Contact Email: Stephen.price@katalystcp.com

Phone Number: 931-338-3674

Date: 02/05/2025

Cover Page

(Appendix A – Proposal Cover Sheet)

- Company Name: **Katalyst Consulting Partners**
- Company Representative and Title: **Stephen Price, Founder and Principal**
- Mailing Address: 191 Timberlake Drive, Florence SC 29501
- Telephone: 931-338-3674
- Email Address: Stephen.price@katalystcp.com
- MAGIC Supplier Registration: Yes
- Supplier Number: 3102134396

- PayMode Registration: Pending
-

Table of Contents

1. Executive Summary
 2. Plan of Action
 3. Administration
 - Resumes of Key Personnel
 - References
 4. Price and Budget
 5. Other Required Information
-

Executive Summary

Katalyst Consulting Partners is proud to submit this proposal in response to **RFP 3120003047**, issued by the **Mississippi Department of Education (MDE)**, to develop a **Strategic Plan and Performance Scorecard**.

At **Katalyst Consulting Partners**, we go beyond traditional project execution—we drive **measurable impact** through our proprietary **Katalyst Advantage** approach. This methodology is built on three core principles:

Project Success – Delivering outcomes on time, within scope, and aligned with MDE’s mission.
Change Adoption – Ensuring stakeholder engagement and seamless implementation.
Continuous Improvement – Creating sustainable frameworks for long-term success.

With extensive experience in **strategic planning, change management, and performance tracking**, our team is uniquely positioned to support MDE in **aligning strategic goals with measurable outcomes**. Our **data-driven approach** ensures that decision-making is rooted in **accurate insights**, while our **stakeholder-centric methodology** fosters collaboration at all levels. While Katalyst is still young as a company, the owner and employees of Katalyst have been delivering high quality results for clients across multiple sectors and states for over 2 decades.

Through a structured **seven-phase approach**, we will:

- ◆ Conduct a **comprehensive environmental scan** and **stakeholder engagement**.
- ◆ Develop **SMART goals** that align with Mississippi’s educational priorities.
- ◆ Design and implement a **Performance Scorecard and Dashboard** for transparency and accountability.

- ◆ Provide an **Implementation Roadmap and Monitoring Plan** to ensure long-term effectiveness.

Katalyst Consulting Partners brings **proven expertise, actionable strategies**, and a **commitment to excellence**. We are ready to **partner with MDE** to create a **strategic framework that drives meaningful educational outcomes for years to come**.

We welcome the opportunity to discuss this proposal further and look forward to the possibility of collaborating with MDE on this **transformational initiative**.

Our Approach

At Katalyst Consulting Partners, we understand that success in strategic planning extends beyond project completion. It requires measurable outcomes, seamless adoption by stakeholders, and systems to ensure continued improvement. Our approach integrates:

- **Comprehensive Project Management:** We deliver projects on time, within scope, and on budget, guided by PMP-certified professionals and data-driven methodologies.
 - **Collaborative Stakeholder Engagement:** Through workshops, focus groups, and feedback sessions, we ensure alignment between MDE's vision and stakeholder priorities.
 - **Actionable Performance Metrics:** We develop a robust Performance Scorecard to track progress toward strategic goals, creating a transparent framework for accountability and success.
-

Proposed Services

Our work will be executed in six distinct phases:

1. **Project Initiation and Planning:** Establish objectives, timelines, and stakeholder roles, ensuring a clear roadmap for success.
2. **Environmental Scan and Data Collection:** Analyze current strategic plans and performance data to inform the development of goals and strategies.
3. **Strategic Goal Development:** Define measurable, actionable goals that align with MDE's mission and stakeholder feedback.
4. **Performance Scorecard Development:** Create a dashboard to track key performance indicators (KPIs) for both internal and public-facing transparency.
5. **Stakeholder Engagement and Validation:** Incorporate input from educators, policymakers, students, and community leaders to refine the plan.
6. **Implementation and Monitoring Plan:** Deliver a roadmap for sustainable success, ensuring MDE is equipped to monitor progress and make data-driven adjustments.

Why Katalyst Consulting Partners?

Expertise

- **Experienced Team:** Led by **Stephen Price**, a PMP-certified professional with over 15 years of experience in strategic planning and government contracting, our team brings deep expertise in delivering impactful solutions to educational and governmental organizations.
- **Proven Methods:** With extensive experience in the healthcare and public sectors, we have successfully executed similar projects for nonprofit organizations, government agencies, and private entities.

Tailored Solutions

- **Customized Approach:** We prioritize a bespoke strategy tailored to MDE's unique needs, leveraging Mississippi's education data systems like MSIS to create meaningful insights.
- **Continuous Improvement:** Our solutions ensure long-term value by equipping MDE with tools and frameworks for ongoing monitoring, adjustment, and growth.

Commitment to Results

- **Transparency and Accountability:** We ensure progress is measurable, goals are realistic, and results are actionable.
- **Stakeholder-Centric:** Through a collaborative process, we build consensus and ensure all voices are heard, fostering trust and engagement.

Deliverables

Key deliverables include:

- A finalized **Strategic Plan** with clear goals, actionable strategies, and measurable objectives.
 - A **Performance Scorecard** to monitor and report progress.
 - A detailed **Implementation Roadmap** with timelines, responsible parties, and resource allocations.
 - **Training Sessions** for MDE staff on using the scorecard and monitoring tools.
 - Ongoing **Post-Implementation Support** to refine and optimize strategies as needed.
-

Commitment to Excellence

Katalyst Consulting Partners is committed to partnering with MDE to develop a dynamic, forward-looking strategic plan that aligns with your mission and vision. Our goal is to empower the MDE to navigate the complexities of today's educational challenges while building a foundation for future success.

With our expertise, innovative methods, and dedication to client success, we are confident in our ability to deliver a comprehensive, actionable, and sustainable strategic plan that will advance education across Mississippi.

Plan of Action (Tab 1)

Time estimates based on current understanding of scope.

Phase	Project Manager	Project Executive	Strategic Planning Consultant	Data Analyst	Technical Writer
Phase 1: Project Initiation and Planning	50	24	97	64	39
Phase 2: Environmental Scan and Data Collection	50	24	97	64	39
Phase 3: Strategic Goal Development	67	36	129	85	52
Phase 4: Performance Scorecard Development	67	36	129	85	52
Phase 5: Stakeholder Engagement and Validation	50	30	97	64	39
Phase 6: Implementation and Monitoring Plan	34	20	65	42	26
Phase 7: Project Closeout and Knowledge Transfer	18	9	38	21	12
Total Hours	336	179	652	425	259

Phase 1: Project Initiation and Planning

Key Milestones

- Kickoff Meeting with MDE stakeholders
- Development of **Project Work Plan** and engagement strategy

Task Breakdown

- **Project Manager & Executive:** Organize kickoff meeting, define objectives, and establish roles
- **Strategic Planning Consultant:** Develop initial project roadmap and methodology
- **Data Analyst:** Define key data sources and confirm access to MSIS
- **Technical Writer:** Develop initial documentation framework

Resources and Support

- Virtual meeting tools (MS Teams, Zoom)

- Project management software (MS Project, ClickUp)
- Access to relevant MDE documents

Dependencies

- Stakeholder engagement required before **detailed work plan finalization**

Deliverables

1. **Kickoff Meeting Agenda and Summary**
2. **Detailed Project Work Plan**
3. **Stakeholder Identification and Engagement Plan**

Monitoring Plan

- **Performance Indicators:** Completion of project plan and stakeholder mapping
 - **Monitoring Frequency:** Weekly status meetings
 - **Roles & Responsibilities:** Project Manager leads; MDE reviews
 - **Feedback Mechanisms:** Stakeholder input incorporated into revisions
 - **Course Correction Plans:** Adjustments to work plan based on stakeholder input
-

Phase 2: Environmental Scan and Data Collection

Key Milestones

- Completion of **SWOT analysis** and review of MSIS data
- Collection of **stakeholder insights through surveys/interviews**

Task Breakdown

- **Strategic Planning Consultant & Data Analyst:** Conduct SWOT analysis and data review
- **Stakeholder Engagement Lead:** Distribute surveys and conduct interviews
- **Technical Writer:** Document findings

Resources and Support

- Survey tools (SurveyMonkey, Qualtrics)
- Data access permissions for MSIS
- Virtual interview platforms

Dependencies

- Completion of data collection required before strategic goal development

Deliverables

4. **Environmental Scan Report**
5. **Stakeholder Survey and Interview Report**

Monitoring Plan

- **Performance Indicators:** Completion of SWOT and survey analysis
 - **Monitoring Frequency:** Bi-weekly progress reviews
 - **Feedback Mechanisms:** Regular stakeholder meetings
-

Phase 3: Strategic Goal Development (Month 3-4)

Key Milestones

- **Workshops with MDE leadership** to refine mission, vision, and goals
- Development of **SMART objectives**

Task Breakdown

- **Strategic Planning Consultant:** Lead workshops, draft goal framework
- **Project Executive:** Align goals with stakeholder feedback
- **Data Analyst:** Validate data-driven KPIs

Resources and Support

- Workshop materials, virtual meeting tools
- Data visualization tools for presenting trends

Dependencies

- Environmental scan must be **completed** before goal-setting workshops

Deliverables

6. **Mission, Vision, and Core Values Review Report**
7. **Strategic Goal and Objective Framework**
8. **Draft Strategic Plan**

Monitoring Plan

- **Performance Indicators:** Defined and approved strategic goals
- **Monitoring Frequency:** Monthly reviews with MDE leadership

Phase 4: Performance Scorecard Development

Key Milestones

- Development of **internal & public-facing scorecards**
- Integration of **KPI tracking mechanisms**

Task Breakdown

- **Data Analyst:** Define KPI measurement framework
- **Technical Writer:** Document the performance monitoring structure
- **Strategic Planning Consultant:** Ensure alignment with strategic goals

Resources and Support

- Dashboard tools (Power BI, Tableau)
- Data access permissions

Dependencies

- Goals and objectives must be **finalized before scorecard design**

Deliverables

9. **Key Performance Indicator (KPI) Framework**
10. **Performance Scorecard and Dashboard Design**
11. **Scorecard Integration Plan**

Monitoring Plan

- **Performance Indicators:** Accuracy and completeness of KPI framework
- **Monitoring Frequency:** Monthly testing of scorecard metrics
- **Course Correction Plans:** KPI revisions based on MDE feedback

Phase 5: Stakeholder Engagement and Validation (Month 6-8)

Key Milestones

- Conduct **stakeholder workshops for scorecard review**
- **Adjust strategic plan** based on feedback

Task Breakdown

- **Project Executive:** Facilitate workshops
- **Strategic Planning Consultant:** Incorporate feedback into revisions
- **Technical Writer:** Update documentation

Resources and Support

- Stakeholder communication tools (email, MS Teams)

Dependencies

- Scorecard must be **developed before validation workshops**

Deliverables

- 12. **Stakeholder Feedback Report**
- 13. **Revised Strategic Plan and Performance Scorecard**
- 14. **Public Engagement Strategy**

Monitoring Plan

- **Performance Indicators:** Stakeholder participation and feedback integration
- **Monitoring Frequency:** Workshop review meetings

Phase 6: Implementation and Monitoring Plan

Key Milestones

- **Finalization of implementation roadmap**
- Establishing **monitoring processes**

Task Breakdown

- **Project Manager:** Ensure implementation roadmap is executable
- **Strategic Planning Consultant:** Design long-term monitoring strategies

Resources and Support

- Reporting templates, monitoring dashboards

Dependencies

- Stakeholder engagement must be **completed before finalizing roadmap**

Deliverables

15. **Final Strategic Plan Document**
16. **Implementation Roadmap**
17. **Monitoring and Reporting Plan**
18. **Training Materials for MDE Staff**

Monitoring Plan

- **Performance Indicators:** Approval of roadmap and monitoring plan
 - **Monitoring Frequency:** Quarterly check-ins
-

Phase 7: Project Closeout and Knowledge Transfer

Key Milestones

- Final **presentation to MDE leadership**
- Completion of **knowledge transfer process**

Task Breakdown

- **Project Executive:** Conduct final leadership presentation
- **Technical Writer:** Develop knowledge transfer materials

Resources and Support

- Presentation decks, user guides

Dependencies

- Implementation roadmap must be **approved before closeout**

Deliverables

19. **Final Presentation to MDE Leadership and Stakeholders**
20. **Final Compliance Report**
21. **Post-Implementation Support Plan**

Monitoring Plan

- **Performance Indicators:** Successful knowledge transfer and MDE sign-off
- **Monitoring Frequency:** Final validation meeting

Resumes of Key Personnel

This section provides the qualifications and experience of the key personnel assigned to this project.

Jesse Tellez – Project Manager

- **Certifications:** PMP, Lean Six Sigma Black Belt
- **Education:** Master’s Degree in Business Administration
- **Experience:** 18+ years in Project Management, specializing in highly regulated industries including Facilities & Healthcare Management (DoD, NASA, VA)
- **Relevant Expertise:**
 - Managed multi-year strategic planning initiatives for federal agencies
 - Led cross-functional teams in implementing performance tracking systems
 - Experienced in milestone-based project execution and risk mitigation
- **Role in the Project:**
 - **Primary point of contact** for day-to-day project execution
 - Oversee **timeline adherence, deliverable tracking, and stakeholder coordination**
 - Ensure compliance with all **MDE reporting and contractual requirements**

Stephen Price – Project Executive & Stakeholder Engagement Lead

- **Certifications:** PROSCI Certified Change Practitioner, PMP
- **Education:** MBA, MSBA Syracuse University
- **Experience:** 15+ years in strategic planning, project management, and Nonprofit Healthcare Project executions.
- **Relevant Expertise:**
 - Spearheaded **change management** and communication strategies for major Hospital systems
 - Facilitated **stakeholder engagement workshops** to drive alignment and adoption
 - Developed **executive-level strategic frameworks** for nonprofit and government agencies
- **Role in the Project:**
 - Lead **Stakeholder Engagement & Communications Strategy**
 - Oversee **change management implementation**
 - Act as **Executive Sponsor** ensuring strategic alignment

– Data Analyst

- **Data Analytics firm specializes in real time dashboards and tracking.**

2. References

Reference #1

- **Client Name:** Colorado Permanente Medical Group
- **Contact Name/Title:** Brandon Mouton
- **Phone Number:** 303-941-2048
- **Email:**
- **Services Provided:**
 - Ensured Project Delivered on time and on Budget
 - Stakeholder engagement and alignment through an ever-changing environment and priorities
 - Designed a **performance scorecard** for tracking outcomes and employee performance
- **Project Duration:** October 2023 - December 2024

Reference #2

- **Client Name:** Mcleod Onsite Health
- **Contact Name/Title:** Jared Bennett
- **Phone Number:** 931-703-0690
- **Email:**
- **Services Provided:**
 - Ensured clinic delivery per contract, on time and within budget
 - Maintained stakeholder engagement across multiple departments and organizations
- **Project Duration:** October 2022 – January 2025

Price and Budget (Comprehensive and Finalized)

This section provides a detailed **cost breakdown** aligned with the **Mississippi Department of Education (MDE) RFP 3120003047**. The budget reflects all necessary personnel, travel, performance bond, and administrative overhead costs based on the full Scope of Work (SOW).

Summary of Cost Proposal

This proposal outlines a **fixed-price** contract, ensuring a structured budget that aligns with project deliverables.

Category	Total Cost (\$)
Personnel Costs	249,000
Travel Expenses*	39,360
Performance Bond	4,845
Overhead & Contingencies	34,603
Total Project Cost	327,808

2. Detailed Budget Breakdown

Personnel Costs (Based on SOW and 12-Month Engagement)

Role	Hourly Rate (\$)	Estimated Hours	Total Cost (\$)
Project Manager	150	336	50,400
Project Executive	200	179	35,840
Strategic Planning Consultant	115	650	74,840
Data Analyst (Fixed)	155	425	65,875
Technical Writer	85	259	22,045
Total Personnel Cost			249,000

Travel Costs (ONLY IF TRAVEL IS NECESSARY Assumes 32 individual trips 3 days in duration Expensed after trip at cost)

Category	Cost (\$)
Airfare	16,000
Hotel	14,400
Meals & Incidentals	5,760
Local Transportation	3,200
Total Travel Cost	39,360

Performance Bond & Overhead Costs

Category	Cost (\$)
Performance Bond (1.5%)	4,845
Overhead & Contingencies (12%)	34,603
Total Additional Costs	39,448

Payment Schedule

To ensure smooth cash flow, we propose **milestone-based payments** tied to phases and deliverables:

Phase	Percentage	Payment Amount (\$)
Contract Execution	15%	\$ 43,267.20
Phase 1: Project Initiation and Planning	10%	\$ 28,844.80
Phase 2: Environmental Scan and Data Collection	20%	\$ 57,689.60
Phase 3: Strategic Goal Development	15%	\$ 43,267.20
Phase 4: Performance Scorecard Development	15%	\$ 43,267.20
Phase 5: Stakeholder Engagement and Validation	10%	\$ 28,844.80
Phase 6: Implementation and Monitoring Plan	10%	\$ 28,844.80
Phase 7: Project Closeout and Knowledge Transfer	5%	\$ 14,422.40
Total	100%	\$ 288,448.00

4. Cost Justification

- **Personnel Rates:** Industry-standard for **Project Management, Consulting, Data Analysis, and Technical Writing.**
- **Travel Expenses:** Estimated using **government per diem rates and actual costs** for similar projects.
- **Performance Bond:** Required as per **RFP Section 5** for **100% of the annual contract value.**
- **Overhead & Contingencies:** Covers **administrative support, project management software, risk mitigation, and unexpected costs.**

Other Required Information

Tab 5 – Other Required Information

This section includes any additional relevant information requested in the RFP.

1. Compliance & Legal Documentation

Vendor Registration Confirmation

- Supplier is **registered in MAGIC**.
- Supplier Number: 3102134396
- PayMode Registration Pending contract award

Not Debarred from Federal or State Contracts

- Verification that **Katalyst Consulting Partners** is in good standing with federal and state procurement regulations.

Proof of Performance Bond Commitment

- **100% performance bond secured** upon contract award, in accordance with RFP Section 5.

Insurance Coverage Verification

- Business liability insurance documentation **provided** upon request.
-

2. Additional Relevant Information

Statement of Understanding

- Katalyst Consulting Partners acknowledges full compliance with the **terms and conditions outlined in the RFP**.
- **No exceptions or modifications to contract terms** are being requested.

Data Privacy & Confidentiality Commitment

- Katalyst Consulting Partners complies with all **data security and confidentiality requirements** applicable to MDE data and records.

Technical Capabilities

- Confirmation that all deliverables will be **provided in electronic format only**.
- Data analytics and scorecard development will be executed using **industry-standard tools** (e.g., **Tableau, Power BI, Excel-based reporting**).

Project Team Commitment

- All assigned personnel are **available for the full duration of the contract** and will provide consistent support throughout the engagement.
-

Tab 6 – Acknowledgment of Amendments

This section includes the **signed acknowledgment of all RFP amendments** issued by MDE.

1. Acknowledgment of Amendment Number Two (Dated January 28, 2025)

2. Required RFP Appendices

Appendix E – Assurances and Certifications

- Completed and signed.

Appendix F – Release of Proposal as a Public Record

- Completed and signed.

Appendix G – Contracts Section

- Signed acknowledgment of contract terms.

Appendix H – Acknowledgment of Amendments

- **Signed and included in this section.**

Appendix B – Standard Terms and Conditions

Certain terms and conditions are required for contracting. Therefore, the Offeror shall assure agreement and compliance with the following standard terms and conditions.

1. ACKNOWLEDGMENT OF AMENDMENTS

Offerors shall acknowledge receipt of any amendment to the [PROPOSAL, RFP, RFQ, RFA] in writing. The acknowledgement shall be submitted as an attachment to the proposal. Each Offeror shall submit a written acknowledgement of every amendment to the MDE on or before the submission deadline.

2. ACCEPTANCE PERIOD

The electronic copy of the response (proposal) shall be signed and submitted as required in the instructions provided in the solicitation no later than the time and date specified for receipt of responses. Timely submission of the response is the responsibility of the bidder.

3. ACCESS TO RECORDS

Contractor agrees that the MDE, or any of its duly authorized representatives, at any time during the term of this agreement, shall have access to, and the right to audit and examine any pertinent books, documents, papers, and records of Contractor related to Contractor's charges and performance under this agreement. Such records shall be kept by Contractor for a period of three (3) years after final payment under this agreement, unless the MDE authorizes their earlier disposition. Contractor agrees to refund to the MDE any overpayment disclosed by any such audit. However, if any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of 3-year period, the records shall be retained until completion of the action and resolution of all issues which arise from it.

4. ANTI-ASSIGNMENT/SUBCONTRACTING

Contractor acknowledges that it was selected by the State to perform the services required hereunder based, in part, upon Contractor's special skills and expertise. Contractor shall not assign, subcontract, or otherwise transfer this agreement, in whole or in part, without the prior written consent of the State, which the State may, in its sole discretion, approve or deny without reason. Any attempted assignment or transfer of its obligations without such consent shall be null and void. No such approval by the State of any subcontract shall be deemed in any way to provide for the incurrence of any obligation of the State in addition to the total fixed price agreed upon in this agreement. Subcontracts shall be subject to the terms and conditions of this agreement and to any conditions of approval that the State may deem necessary. Subject to the foregoing, this agreement shall be binding upon the respective successors and assigns of the parties.

5. APPLICABLE LAW

The contract shall be governed by and construed in accordance with the laws of the State of Mississippi, excluding its conflicts of laws provisions, and any litigation with respect thereto shall be brought in the courts of Mississippi.

6. APPROVAL

It is understood that if this contract requires approval by the Public Procurement Review Board ("PPRB") and/or the Department of Finance and Administration Office of Personal Service Contract Review ("OPSCR") and this contract is not approved by the PPRB and/or OPSCR, it is void and no payment shall be made hereunder.

7. ATTORNEY'S FEES AND EXPENSES

In the event Contractor defaults on any obligations under this Agreement, Contractor shall pay to the MDE all costs and expenses, without limitation, incurred by the MDE in enforcing this Agreement or reasonably related to enforcing this Agreement. This includes but is not limited to investigative fees, court costs, and attorneys' fees. Under no circumstances shall the MDE be obligated to pay attorneys' fees or legal costs to Contractor.

8. AUTHORITY OF SIGNATORY

Contractor acknowledges that the individual executing the contract on behalf of the MDE is doing so in his or her official capacity only. To the extent any provision contained in the contract exceeds the signatory's authority, Contractor agrees that it will not look to that individual in his or her personal capacity or otherwise seek to hold him or her individually liable for exceeding such authority.

9. AUTHORITY TO CONTRACT

Contractor warrants: (1) that it is a validly organized business with valid authority to enter into this agreement; (2) that it is qualified to do business and in good standing in the State of Mississippi; (3) that entry into and performance under this agreement is not restricted or prohibited by any loan, security, financing, contractual, or other agreement of any kind; and, (4) notwithstanding any other provision of this agreement to the contrary, that there are no existing legal proceedings or prospective legal proceedings, either voluntary or otherwise, which may adversely affect its ability to perform its obligations under this agreement.

10. AVAILABILITY OF FUNDS

It is expressly understood and agreed that the obligation of the MDE to proceed under this agreement is conditioned upon the appropriation of funds by the Mississippi State Legislature and the receipt of appropriated funds. If the funds anticipated for the continuing time fulfillment of, the MDE shall have the right upon ten (10) working days written notice to Contractor, to terminate this agreement without damage, penalty, cost or expenses to the MDE of any kind whatsoever. The effective date of termination shall be as specified in the notice of termination.

11. BACKGROUND CHECKS

Contractor and/or its employees represents neither has ever been convicted or pled guilty or entered a plea of nolo contendere to a felony in any court of the state of Mississippi, another state, or in federal court in which public funds were unlawfully taken, obtained or misappropriated in the abuse of misuse of any office or employment or money coming into its hands by virtue of any office or employment. Contractor and/or its employees agrees to an initial criminal background check to be performed as well as subsequent criminal background checks that may be necessary and all charges associated with these criminal background checks will be the responsibility of Contractor, if applicable. Any disqualifying information received from the criminal background check will render this agreement null and void.

12. BOARD APPROVAL

It is understood that if this contract requires approval by the Mississippi State Board of Education, and this contract is not approved by the Mississippi State Board of Education, it is void and no payment shall be made hereunder.

13. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION

By submitting a proposal the offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without any consultation, communication, or agreement with any other [bidder, offeror] or competitor for the purpose of restricting competition.

14. CHANGES IN SCOPE OF WORK

The MDE may order changes in the work consisting of additions, deletions, or other revisions within the general scope of the contract. No claims may be made by Contractor that the scope of the project or of Contractor's services has been changed, requiring changes to the amount of compensation to Contractor or other adjustments to the contract, unless such changes or adjustments have been made by written amendment to the contract signed by the MDE and Contractor.

If Contractor believes that any work is not within the scope of the project, is a material change, or will otherwise require more compensation to Contractor, Contractor must immediately notify the MDE in writing of this belief. If the MDE believes that the work is within the scope of the contract as written, Contractor will be ordered to and shall continue with the work as changes and at the cost stated for the work within the contract.

15. COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Contractor understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

16. COMPLIANCE WITH LAWS

Contractor shall comply with, and all activities under this agreement shall be subject to, all applicable federal, state, and local laws and regulations, as now existing and as may be amended or modified.

17. CONFIDENTIALITY

The MDE is a public agency of the State of Mississippi and is subject to the *Mississippi Public Records Act of 1983*. Miss. Code Ann. §§ 25-61-1 *et seq.* If a public records request is made for any information provided to the MDE by Contractor, the MDE shall follow provisions of Mississippi Code Annotated §§ 25-61-9 and 79-23-1 before disclosing such information – unless Contractor has previously indicated the information is not trade secret or confidential commercial and financial information. The MDE shall not be liable to the Contractor for disclosure of information required by court order or required by law.

18. CONTRACT ASSIGNMENT AND SUBCONTRACTING

Contractor acknowledges that it was selected by the MDE to perform the services required hereunder based, in part, upon Contractor's special skills and expertise. Contractor shall not assign, subcontract, or otherwise transfer this agreement, in whole or in part, without the prior written consent of the MDE, which may, in its sole discretion, approve or deny without reason. Any attempted assignment or transfer of Contractor's obligations hereunder without consent of the MDE shall be null and void.

Subcontracts shall be subject to the terms and conditions of this agreement and to any conditions of approval that the MDE may deem necessary. Subject to the foregoing, this agreement shall be binding upon the respective successors and assigns of the parties.

MDE reserves the right to request changes in personnel assigned to the project. The MDE Project Manager must pre-approve any changes in key personnel through the contract term. Substitutions are not permitted without written approval of the MDE Program Project Manager.

19. CONTRACT RIGHTS

Contract rights do not vest in any party until a contract is legally executed. The MDE is under no obligation to award a contract following issuance of this solicitation.

20. CONTRACTOR PERSONNEL

The MDE shall, throughout the life of the contract, have the right of reasonable rejection and approval of staff or subcontractors assigned to the work by Contractor. If the MDE reasonably rejects staff or subcontractors, Contractor shall provide replacement staff or subcontractors satisfactory to the MDE in a timely manner and at no additional cost to the MDE. The day-to-day supervision and control of Contractor's employees and subcontractors is the sole responsibility of Contractor.

Contractor agrees that, at all times, the employees of contractor furnishing or performing any of the services specified under this agreement shall do so in a proper, workmanlike, and dignified manner.

21. COPYRIGHTS

Contractor agrees the MDE shall determine the disposition of the title to and the rights under any copyright by Contractor or employees on copyrightable material first produced or composed under this agreement. Further, Contractor hereby grants to the MDE a royalty-free, nonexclusive, irrevocable license to reproduce, translate, publish, use and dispose of, and to authorize others to do so, all copyrighted (or copyrightable) work not first produced or composed by Contractor in the performance of this agreement, but which is incorporated in the material furnished under the agreement. This grant is provided that such license shall be only to the extent Contractor now has, or prior to the completion of full final settlements of agreement may acquire, the right to grant such license without becoming liable to pay compensation to others solely because of such grant. Contractor further agrees that all material produced and/or delivered under this contract will not, to the best of Contractor's knowledge, infringe upon the copyright or any other proprietary rights of any third party. Should any aspect of the materials become, or in Contractor's opinion be likely to become, the subject of any infringement claim or suit, Contractor shall procure the rights to such material or replace or modify the material to make it non-infringing.

22. DEBARMENT AND SUSPENSION

Contractor certifies to the best of its knowledge and belief, that it:

- (1) is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transaction by any federal department or agency or any political subdivision or agency of the State of Mississippi;
- (2) has not, within a three year period preceding this qualification, been convicted of or had a civil judgment rendered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction;
- (3) has not, within a three year period preceding this qualification, been convicted of or had a civil judgment rendered against it for a violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (4) is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state or local) with commission of any of these offenses enumerated in paragraph two (2) and (3) of this certification; and,

(5) has not, within a three year period preceding this qualification, had one or more public transactions (federal, state, or local) terminated for cause or default.

23. DISCLOSURE OF CONFIDENTIAL INFORMATION

In the event that either party to this agreement receives notice that a third-party has served upon it a subpoena or other validly issued administrative or judicial process ordering divulgence of the other party's data or other confidential or otherwise protected information, the party subject to the subpoena or other legal process shall promptly inform the other party at the earliest reasonable opportunity, unless prohibited by law from doing so. Thereafter, the party subject to the legal process shall respond to the extent mandated by law. This section shall survive the termination or completion of this agreement. The parties agree that this section is subject to and superseded by Miss. Code Ann. §§ 25-61-1 *et seq.*

24. E-PAYMENT

Contractor agrees to accept all payments in United States currency via the State of Mississippi's electronic payment and remittance vehicle. The agency agrees to make payment in accordance with Mississippi law on "Timely Payments for Purchases by Public Bodies," which generally provides for payment of undisputed amounts by the Agency within forty-five (45) calendar days of receipt of invoice. Mississippi Code Ann. § 31-7-301 *et seq.*

25. E-VERIFICATION

If applicable, Contractor represents and warrants that it will ensure its compliance with the *Mississippi Employment Protection Act* and will register and participate in the status verification system for all newly hired employees. Mississippi Code Ann. §§ 71-11-1 and 71-11-3. Contractor agrees to provide a copy of each verification upon request of the MDE subject to approval by any agencies of the United States Government. Contractor further represents and warrants that any person assigned to perform services hereafter meets the employment eligibility requirements of all immigration laws. The breach of this agreement may subject Contractor to the following:

- (1) termination of this contract and exclusion pursuant to Chapter 15 of the Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations;
- (2) the loss of any license, permit, certification or other document granted to Contractor by an agency, department or governmental entity for the right to do business in Mississippi; or,
- (3) both. In the event of such cancellation/termination, Contractor would also be liable for any additional cost incurred by the Agency due to Contract cancellation or loss of license or permit to do business in the state.

26. ENTIRE AGREEMENT

This agreement, including all contract documents, represents the entire and integrated agreement between the parties hereto and supersedes all prior negotiations, representations or agreements, irrespective of whether written or oral. This agreement may be altered, amended, or modified only by a written document executed by the MDE and Contractor. Contractor acknowledges that it has thoroughly read all contract documents and has had the opportunity to receive competent advice and counsel necessary for it to form a full and complete understanding of all rights and obligations herein. Accordingly, this agreement shall not be construed or interpreted in favor of or against the MDE or Contractor on the basis of draftsmanship or preparation hereof.

27. EXCEPTIONS TO CONFIDENTIAL INFORMATION

Contractor and the State shall not be obligated to treat as confidential and proprietary any information disclosed by the other party ("disclosing party") which:

- (1) Is rightfully known to recipient prior to negotiations leading to this agreement, other than information obtained in confidence under prior engagements;
- (2) is generally known or easily ascertainable by nonparties of ordinary skill in the business of the customer;
- (3) is released by the disclosing party to any other person, firm, or entity (including governmental agencies or bureaus) without restriction;
- (4) is independently developed by the recipient without any reliance on confidential information;
- (5) is or later becomes part of the public domain or may be lawfully obtained by the State or Contractor from any nonparty; or,
- (6) is disclosed with the disclosing party's prior written consent.

28. EXCEPTIONS TO SOLICITATION

Offerors taking exception to any part of the solicitation shall clearly indicate such exceptions in its offer. Failure to indicate any exception will be interpreted as the Offeror's intent to comply fully with the requirements as written. Conditional or qualified offers, unless specifically allowed, shall be subject to rejection in whole or in part.

29. EXPENSES INCURRED IN THE PROCUREMENT PROCESS

All parties participating in the procurement process with regard to this solicitation shall bear their own costs of participation, pursuant to Section 1.4.4 of the *Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations*.

30. FAILURE TO DELIVER

In the event of failure of Contractor to deliver services in accordance with the contract terms and conditions, the MDE after due oral or written notice, may procure the services from other sources and hold Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies that the MDE may have.

31. FAILURE TO ENFORCE DOES NOT CONSTITUTE WAIVER

Failure by the MDE at any time to enforce the provisions of the contract shall not be construed as a waiver of any such provisions. Such failure to enforce shall not affect the validity of the contract or any part thereof or the right of the MDE to enforce any provision at any time in accordance with its terms.

32. FORCE MAJEURE

Each party shall be excused from performance for any period and to the extent that it is prevented from performing any obligation or service, in whole or in part, as a result of cause beyond the reasonable control and without the fault or negligence of such party and/or its subcontractors. Such acts shall include without limitation acts of God, strikes, lockouts, riots, acts of war, epidemics, governmental regulations superimposed after the fact, fire, earthquakes, floods or other natural disasters ("force majeure events"). When such a cause arises, Contractor shall notify the MDE immediately in writing of the cause of its inability to perform, how it affects its performance, and the anticipated duration of the inability to perform. All parties shall make reasonable efforts to minimize the impact of the force majeure event on contract performance. The MDE may exercise any rights it has under the contract which are available when neither party is in default. Delays in delivery or in meeting completion dates due to force majeure events shall automatically extend

such dates for a period equal to the duration of the delay caused by such events, unless the MDE determines it to be in its best interest to terminate this agreement.

33. INDEMNIFICATION

To the fullest extent allowed by law, Contractor shall indemnify, defend, save and hold harmless, protect, and exonerate the agency, its commissioners, board members, officers, employees, agents, and representatives, and the State of Mississippi from and against all claims, demands, liabilities, suits, actions, damages, losses, and costs of every kind and nature whatsoever including, without limitation, court costs, investigative fees and expenses, and attorney's fees, arising out of or caused by Contractor and/or its partners, principals, agents, employees and/or subcontractors in the performance of or failure to perform this agreement. In the State's sole discretion upon approval of the Office of the Mississippi Attorney General, Contractor may be allowed to control the defense of any such claim, suit, etc. In the event Contractor defends said claim, suit, etc., Contractor shall use legal counsel acceptable to the Office of the Mississippi Attorney General. Contractor shall be solely responsible for all costs and/or expenses associated with such defense, and the State shall be entitled to participate in said defense. Contractor shall not settle any claim, suit, etc. without the concurrence of the Office of the Mississippi Attorney General, which shall not be unreasonably withheld.

34. INDEPENDENT CONTRACTOR STATUS

Contractor shall, at all times, be regarded as and shall be legally considered an independent contractor and shall at no time act as an agent for the MDE. Nothing contained herein shall be deemed or construed by the MDE, Contractor, or any third party as creating the relationship of principal and agent, master and servant, partners, joint ventures, employer and employee, or any similar such relationship between the MDE and Contractor. Neither the method of computation of fees or other charges, nor any other provision contained herein, nor any acts of the MDE or Contractor hereunder creates or shall be deemed to create a relationship other than the independent relationship of the MDE and Contractor.

Contractor's personnel shall not be deemed in any way, directly or indirectly, expressly or by implication, to be employees of the MDE. Neither Contractor nor its employees shall, under any circumstances, be considered servants, agents, or employees of the MDE, and the MDE shall be at no time legally responsible for any negligence or other wrongdoing by Contractor, its servants, agents, or employees.

The MDE shall not withhold from the contract payments to Contractor any federal or state unemployment taxes, federal or state income taxes, Social Security tax, or any other amounts for benefits to Contractor. Further, the MDE shall not provide to Contractor any insurance coverage or other benefits, including Workers' Compensation, normally provided by the MDE for its employees.

35. INFORMATION DESIGNATED BY AGENCY AS CONFIDENTIAL

Any liability resulting from the wrongful disclosure of confidential information on the part of Contractor, or its subcontractor(s) shall rest with Contractor. Disclosure of any confidential information by Contractor or its subcontractor(s) without the express written approval of the MDE may result in the immediate termination of this agreement.

36. INFORMATION DESIGNATED BY CONTRACTOR AS CONFIDENTIAL

Any disclosure of those materials, documents, data, and other information which Contractor has designated in writing as proprietary and confidential shall be subject to the provisions of Mississippi Code Annotated §§ 25-61-9 and 79-23-1. As provided in the contract, the personal or professional services to be provided, the price to be paid, and the term of the contract shall not be deemed to be a trade secret, or confidential commercial or financial information.

37. INFRINGEMENT INDEMNIFICATION

Contractor warrants that the materials and deliverables provided to the MDE under this agreement, and their use by the MDE, will not infringe or constitute an infringement of any copyright, patent, trademark, or other proprietary right. Should any such items become the subject of an infringement claim or suit, Contractor shall defend the infringement action and/or obtain for the MDE the right to continue using such items without additional cost to the Agency. Should Contractor fail to obtain for the MDE the right to use such items, Contractor shall suitably modify them to make them non-infringing or substitute equivalent software or other items at Contractor's expense.

In the event the above remedial measures cannot possibly be accomplished, and only in that event, Contractor may require the MDE to discontinue using such items, in which case Contractor will refund to the MDE the fees previously paid by the MDE for the items the customer may no longer use, and shall compensate the MDE for the lost value of the infringing part to the phase in which it was used, up to and including the contract price for said phase. Said refund shall be paid within 10 business days of notice to the MDE to discontinue said use.

Scope of Indemnification: Provided that the MDE promptly notifies Contractor in writing of any alleged infringement claim of which it has knowledge, Contractor shall defend, indemnify, and hold harmless the MDE against any such claims, including but not limited to any expenses, costs, damages and attorney fees that a court finally awards for infringement based on the programs and deliverables provided under this agreement.

In the MDE's sole discretion, upon approval of the Office of the Mississippi Attorney General and the MDE, Contractor may be allowed to control the defense of any such claim, suit, etc. In the event Contractor defends said claim, suit, etc., Contractor shall use legal counsel acceptable to the Office of the Mississippi Attorney General and the MDE. Contractor shall be solely responsible for all costs and/or expenses associated with such defense, and the MDE shall be entitled to participate in said defense. Contractor shall not settle any claim, suit, etc. without the concurrence of the Office of the Mississippi Attorney General and the MDE, which shall not be unreasonably withheld.

38. LEGAL AND TECHNICAL SUPPORT

Contractor shall utilize its knowledge and understanding of applicable legal standards and comply with recognized professional standards and generally accepted measurement principles applicable to assessments and uses of the type described in this contract, including but not limited to standards relating to validity and reliability. Contractor shall consult with the MDE concerning its implementation of the requirements of this section. In the event of a challenge in which the validity or reliability of the use of an assessment developed under this contract is an issue (other than a challenge based on infringement of copyright or other proprietary rights of a third party), Contractor shall cooperate with the MDE and/or the State of Mississippi in the defense of the assessment and shall provide reasonable technical and legal support with regard to Contractor's activities under this contract without additional charges to the MDE or the State.

39. MODIFICATION OR RENEGOTIATION

The parties agree to renegotiate the agreement in good faith if federal and/or state revisions to any applicable laws or regulations make changes in this agreement necessary. This agreement may be modified only by written agreement signed by the parties hereto and approval by the SBE and Public Procurement Review Board, if required.

40. MINOR INFORMALITIES AND IRREGULARITIES

The MDE has the right to waive minor defects or variations of a [bid, proposal, qualification, application] from the exact requirements of the specifications that do not affect the price, quality, quantity, delivery, or performance of the services being procured and if doing so does not create

an unfair advantage for any offeror. If insufficient information is submitted by an offeror for the MDE to properly evaluate the offer, the MDE has the right to require such additional information as it may deem necessary after the submission deadline, provided that the information requested does not change the price, quality, quantity, delivery or performance time of the services being procured and such a request does not create an unfair advantage for any offeror. (*Information requested may include, for example, a copy of business or professional license, or a work schedule.*)

41. NO LIMITATION OF LIABILITY

Nothing in this agreement shall be interpreted as excluding or limiting any tort liability of Contractor for harm arising out of the Contractor's or its subcontractors' performance under this agreement.

42. ORAL STATEMENTS

No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in this contract. All modifications to the contract shall be made in writing by the MDE, agreed to by Contractor and approved by the SBE and Public Procurement Review Board, if required.

43. PAYMODE

Payments by the MDE using the state's accounting system shall be made and remittance information provided electronically as directed by the State and deposited into the bank account of Contractor's choice. The MDE may, at its sole discretion, require Contractor to electronically submit invoices and supporting documentation at any time during the term of this Agreement. Contractor understands and agrees that the Agency is exempt from the payment of Mississippi taxes. All payments shall be in United States currency.

44. PRICE ADJUSTMENT

- (1) **Price Adjustment Methods.** Any adjustments in contract price, pursuant to a clause in this contract, shall be made in one or more of the following ways:
- a. must be stated in the solicitation describing the method in which any price adjustment will be calculated, the triggering event which makes the price adjustment clause to be enacted.
 - b. by agreement on a fixed price adjustment before commencement of the Additional performance;
 - c. by unit prices specified in the contract;
 - d. by the costs attributable to the event or situation covered by the clause, plus appropriate profit or fee, all as specified in the contract; or,
 - e. by the price escalation clause.
- (2) **Submission of Cost or Pricing Data.** Contractor shall provide cost or pricing data for any price adjustments.

45. PRICE CERTIFICATION

Any Offeror submitting a response to this solicitation agrees and certifies that it will honor its pricing and all terms and conditions herein for the duration of the contract term described in this solicitation. By submitting a response hereto, Offeror agrees to accept a contract pursuant to the requirements of

Section 14.15 of the Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations if so requested by the procuring Agency.

46. PROCUREMENT REGULATIONS

The contract shall be governed by the applicable provisions of the *Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations*, a copy of which is available on the Mississippi Department of Finance and Administration's website (www.dfa.ms.gov). Any Offeror responding to a solicitation for personal and professional services and any contractor doing business with a state Agency is deemed to be on notice of all requirements therein.

47. PROPERTY RIGHTS

Property rights do not inure to any [Bidder, Offeror] until such time as services have been provided under a legally executed contract. No party responding to this [IFB, RFP, RFQ] has a legitimate claim of entitlement to be awarded a contract or to the provision of work thereunder. The MDE is under no obligation to award a contract and may terminate a legally executed contract at any time.

48. RECOVERY OF MONEY

Whenever, under the contract, any sum of money shall be recoverable from or payable by Contractor to the MDE, the same amount may be deducted from any sum due to Contractor under the contract or under any other contract between Contractor and the MDE. The rights of the MDE are in addition and without prejudice to any other right the MDE may have to claim the amount of any loss or damage suffered by the MDE on account of the acts or omissions of Contractor.

49. RENEWAL OF CONTRACT

The contract may be renewed at the discretion of the MDE for the term specified in the solicitation under the same prices, terms, and conditions as in the original contract. The total number of renewal years permitted shall not exceed the term specified in the solicitation.

50. CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES

By executing the contract the contractor represents that it has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract. If contractor cannot make such representation, a full and complete explanation shall be submitted in writing to MDE prior to contract execution.

51. REPRESENTATION REGARDING GRATUITIES

Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of [Agency] a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. [Offeror, Contractor] further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by offeror. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law

52. REQUIRED PUBLIC RECORDS AND TRANSPARENCY

Upon execution of a contract, the provisions of the contract which contain the personal or professional services provided, the unit prices, the overall price to be paid, and the term of the contract shall not be deemed to be a trade secret or confidential commercial or financial information pursuant to Mississippi Code Annotated § 25-61-9(7). The contract shall be posted

publicly on www.transparency.ms.gov and shall be available for at the Agency for examination, inspection, or reproduction by the public. The offeror acknowledges and agrees that the MDE and this contract are subject to the Mississippi Public Records Act of 1983 codified at Mississippi Code Annotated §§ 25-61-1, et seq. and its exceptions, Mississippi Code Annotated § 79-23-1, and the *Mississippi Accountability and Transparency Act of 2008*, codified at Mississippi Code Annotated §§ 27-104-151, et seq.

53. RIGHT TO AUDIT

Contractor shall maintain such financial records and other records as may be prescribed by the MDE or by applicable federal and state laws, rules, and regulations. Contractor shall retain these records for a period of three years after final payment, or until they are audited by the MDE, whichever event occurs first. These records shall be made available during the term of the contract and the subsequent three-year period for examination, transcription, and audit by the Mississippi State Auditor's Office, its designees, or other authorized bodies.

54. RIGHT TO INSPECT FACILITY

The MDE may, at reasonable times, inspect the place of business of a Contractor or any subcontractor which is related to the performance of any contract awarded by the MDE.

55. SEVERABILITY

If any part of this agreement is declared invalid or unenforceable, such invalidity or unenforceability shall not affect any other provision of the agreement that can be given effect without the invalid or unenforceable provision, and to this end the provisions hereof are severable. In such event, the parties shall amend the agreement as necessary to reflect the original intent of the parties and to bring any invalid or unenforceable provision in compliance with applicable law.

56. STATE PROPERTY

Contractor will be responsible for the proper custody and care of any state-owned property furnished for Contractor's use in connection with the performance of this agreement. Contractor will reimburse the state for any loss or damage, normal wear and tear excepted.

57. STOP WORK ORDER

The MDE may, by written order to Contractor at any time, require Contractor to stop all or any part of the work called for by this contract. This order shall be for a period of time specified by the MDE. Upon receipt of such an order, Contractor shall forthwith comply with its terms and take all reasonable steps to minimize any further cost to the MDE. Upon expiration of the stop work order, Contractor shall resume providing the services which were subject to the stop work order, unless the MDE has terminated that part of the agreement or terminated the agreement in its entirety. The MDE is not liable for payment for services which were not rendered due to the stop work order.

58. TERMINATION

Termination for Convenience. The MDE may, when the interests of the Agency so require, terminate this contract in whole or in part, for the convenience of the Agency. The MDE shall give written notice of the termination to Contractor specifying the part of the contract terminated and when termination becomes effective. Contractor shall incur no further obligations in connection with the terminated work and on the date set in the notice of termination Contractor will stop work to the extent specified. Contractor shall complete the work not terminated by the notice of termination and may incur obligations as are necessary to do so.

Termination for Default. If the MDE gives the Contractor a notice that the personal or professional services are being provided in a manner that is deficient, the Contractor shall have 30 days to cure the deficiency. If the Contractor fails to cure the deficiency, the MDE may terminate the contract for default and the Contractor will be liable for the additional cost to the MDE to procure the

personal and professional services from another source. Termination under this paragraph could result in Contractor being excluded from future contract awards pursuant to Chapter 15 of the Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. Any termination wrongly labelled termination for default shall be deemed a termination for convenience.

59. TERMINATION UPON BANKRUPTCY

This contract may be terminated in whole or in part by the MDE upon written notice to Contractor, if Contractor should become the subject of bankruptcy or receivership proceedings, whether voluntary or involuntary, or upon the execution by Contractor of an assignment for the benefit of its creditors. In the event of such termination, Contractor shall be entitled to recover just and equitable compensation for satisfactory work performed under this contract, but in no case shall said compensation exceed the total contract price.

60. THIRD PARTY ACTION NOTIFICATION

Contractor shall give the customer prompt notice in writing of any action or suit filed, and prompt notice of any claim made against Contractor by any entity that may result in litigation related in any way to this agreement.

61. TRADE SECRETS, COMMERCIAL AND FINANCIAL INFORMATION

It is expressly understood that Mississippi law requires that the provisions of this contract which contain the commodities purchased or the personal or professional services provided, the price to be paid, and the term of the contract shall not be deemed to be a trade secret or confidential commercial or financial information and shall be available for examination, copying, or reproduction.

62. UNSATISFACTORY WORK

If, at any time during the contract term, the service performed, or work done by Contractor is considered by the Agency to create a condition that threatens the health, safety, or welfare of the citizens and/or employees of the State of Mississippi, Contractor shall, on being notified by the Agency, immediately correct such deficient service or work. In the event Contractor fails, after notice, to correct the deficient service or work immediately, the Agency shall have the right to order the correction of the deficiency by separate contract or with its own resources at the expense of Contractor.

End of this page

Appendix C - References

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Appendix D - REFERENCE SCORE SHEET

Applicant Name:
Reference Name:
Person Contacted, Title/Position:
Date/Time Contacted:
Service From/To Dates:

Able to provide services when you called?	Yes	No
Satisfied with the services provided? If no, please explain.	Yes	No
Applicant easy to work with in scheduling services?	Yes	No
Was the service completed on time and within budget?	Yes	No
Applicant listened when issues were presented to resolve conflict? (If never had an issue, please check here ____.)	Yes	No
Would you hire them again?	Yes	No
Would you recommend them?	Yes	No

Potential applicant must have a minimum of 6 “yes” answers on the questions above from two references (total of 12 “yes” answers) to be considered responsible and to be considered.

Score: Pass/Fail

Do you have any business, professional or personal interest with the applicant? If yes, please explain.	Yes	No
---	-----	----

A “yes” to the above question may result in an automatic disqualification of the provided reference; therefore, resulting in a score of zero as responses to previous questions become null and void.

Notes:

Program Director: _____
Signature
Title
Date

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](#) under “Public Notice” Request for Applications, Qualifications, and Proposals section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: *If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.*

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor’s bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The Offeror represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s bid or proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: _____

Title: _____

Signature: _____ Date: _____

Modifications or additions to any portion of this document may cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

_____ Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

_____ Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not ()** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	



**MISSISSIPPI
DEPARTMENT OF
EDUCATION**

**State Board of Education
Strategic Planning and Performance Scorecard**

**Attention: MONIQUE CORLEY
Office of Procurement
The Mississippi Department of Education
359 North West Street
Jackson, Mississippi 39201**

**State Board of Education Strategic Planning and Performance Scorecard
RFX# 3120003050**

Submission Deadline Date: February 5, 2025



**Deloise McIntosh
Chief Executive Officer**

**(e) lmcintoshconsulting@gmail.com
(o) (517) 214-3586
(a) 107 Wethersfield Dr., Madison, MS 39110**

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COMPONENT 1 – PLAN OF ACTION

Executive Summary

The Mississippi Department of Education (MDE) is embarking on a comprehensive strategic planning initiative to guide its efforts in improving educational outcomes across the state. This project aims to develop a robust, actionable strategic plan that aligns with the MDE's mission and addresses the evolving needs of Mississippi's education system.

Key Components

1. **Stakeholder Engagement:** Utilizing a multi-layered approach to engage diverse stakeholders, including educators, policymakers, community leaders, and students, ensuring broad representation and input.
2. **Data-Driven Analysis:** Conducting a thorough environmental scan, including a SWOT analysis and comprehensive data collection, to inform strategic decision-making.
3. **Strategy Development:** Formulating clear, measurable goals and initiatives aligned with the MDE's vision for educational excellence.
4. **Performance Management:** Developing Key Performance Indicators (KPIs) and an intuitive scorecard to track progress and ensure accountability.
5. **Implementation Roadmap:** Creating a detailed plan for executing the strategy, including resource allocation and phased deployment of initiatives.
6. **Monitoring and Evaluation:** Establishing robust systems for ongoing progress tracking, regular reviews, and adaptability to changing circumstances.

LMcIntosh Career Consulting is poised to deliver exceptional strategic planning and performance scorecard solutions for the Mississippi Department of Education. With over 20 years in management consulting, our team possesses a wealth of experience crafting actionable, data-driven strategies that align with client objectives. Our expertise spans stakeholder engagement, strategic plan development, and KPIs, all tailored to foster educational excellence.

Timeline and Expected Outcomes

The project is structured over 12 months, allowing for thorough development, stakeholder input, and refinement of the strategic plan, and will include the following expected outcomes:

- A comprehensive, actionable strategic plan aligned with MDE's goals
- Enhanced stakeholder engagement and buy-in
- Improved data-driven decision-making capabilities

- Clear performance metrics and accountability measures
- A roadmap for successful implementation and continuous improvement

This strategic planning initiative will provide the MDE with a powerful tool to drive meaningful improvements in Mississippi's education system, ultimately benefiting students, educators, and communities across the state.

Committed to outcome-oriented projects, we ensure comprehensive implementation and monitoring plans that support the Department's mission while adhering to industry best practices. Our approach underscores collaboration, innovation, and measurable success.

PRODUCTION/DETAILED SERVICE PLAN

Technical Approach

In response to the Mississippi Department of Education's Solicitation 3120003047, LMcIntosh Career Consulting proposes a robust methodology leveraging our profound expertise in strategic planning and stakeholder engagement. Our approach encompasses a structured, phased methodology to develop a dynamic strategic plan and performance scorecard aligned with educational priorities at both the state and local levels.

Phase 1: Project Initiation and Planning

Kick-off Meeting: We will organize an initial meeting with key stakeholders to establish clear objectives, timelines, and roles, ensuring full alignment with MSDE objectives.

Our approach to Project Initiation and Planning for the Mississippi Department of Education's strategic planning process is designed to establish a strong foundation for success. We will begin with a comprehensive kick-off meeting involving key State Board of Education (SBE) members and Board Designees. This meeting will serve as a crucial platform to clarify objectives, establish timelines, and define roles, ensuring all stakeholders are aligned from the outset. Building on this initial engagement, we will develop a detailed project work plan that outlines specific milestones, timelines, and deliverables. This plan will also include robust communication protocols to facilitate seamless information flow throughout the project lifecycle.

Project Work Plan: Develop a comprehensive work plan detailing milestones, timelines, deliverables, and communication protocols.

Recognizing the importance of broad engagement, we will conduct a thorough stakeholder identification process, documenting both internal and external key players. This comprehensive approach to stakeholder mapping will ensure that we capture diverse perspectives and insights, enriching the strategic planning process. Our stakeholder engagement strategy will be designed to foster meaningful input and participation throughout all phases of the project, from initial concept development to final implementation. By establishing this strong foundation in the project initiation and planning phase, we aim to set the stage for a collaborative, inclusive, and effective strategic planning process that aligns with the Mississippi Department of Education's commitment to "provide leadership through the development of policy and accountability systems" as outlined in their current strategic plan.

Phase 2: Environmental Scan and Data Collection

For Phase 2 of the strategic planning process, we will conduct a comprehensive environmental scan and data collection, focusing on two key deliverables: a thorough SWOT analysis and stakeholder surveys.

SWOT Analysis: Conduct a thorough SWOT analysis supported by a review of existing documentation to assess internal capabilities and external challenges

Our SWOT analysis will critically assess the Mississippi Department of Education's internal capabilities and external challenges. We will review existing documentation, including current strategic plans, performance data, and relevant reports. This review will inform our analysis of the organization's Strengths, Weaknesses, Opportunities, and Threats. To ensure a well-rounded perspective, we'll engage key stakeholders in this process, including faculty, staff, administrators, and board members. The SWOT analysis will cover internal factors such as faculty expertise, learning environments, and operational processes, as well as external factors like industry trends, legislative impacts, and technological advancements. This comprehensive approach will provide a clear picture of where the department stands and where it aims to go, serving as a driving force for implementing strategic changes.

Stakeholder Surveys: Engage various stakeholders through surveys and interviews to capture diverse insights and ensure inclusive input in the planning process.

Simultaneously, we will design and conduct stakeholder surveys to capture diverse insights and ensure inclusive input in the planning process. These surveys will target various groups, including teachers, specialists, parents, students, and community partners. We'll use a mix of open-ended questions to illuminate values and experiences, as well as Likert-scale questions to gauge consensus on priorities. The surveys will be designed to be concise, requiring no more than 10 minutes to complete, and will be available in multiple formats to maximize accessibility. We'll also leverage technology, using online survey tools and translation services to address language barriers and increase participation. The survey results will help establish baseline performance aligned with LCAP goals and inform decision-making for future programs and services. This stakeholder engagement process will not only gather valuable input but also demonstrate the department's commitment to transparency and accountability in its strategic planning efforts.

Phase 3: Strategy Development

In Phase 3 of our strategic planning process for the Mississippi Department of Education (MDE), we will focus on Strategy Development, encompassing a thorough Mission and Vision Review and comprehensive Goal Setting & Strategy Formulation.

Mission and Vision Review: Facilitate discussions to reassess or reconfirm the agency's mission, vision, and core values.

For the Mission and Vision Review, we will facilitate in-depth discussions with key leadership, including the State Board of Education members and senior MDE officials. These sessions will critically examine the current mission statement, which emphasizes preparing students for success in college, the workforce, and as citizens. We'll explore whether this mission still accurately reflects the department's purpose and aspirations, especially in light of evolving educational landscapes and societal needs. Similarly, we'll reassess the vision of creating a world-class educational system, ensuring it aligns with Mississippi's unique challenges and opportunities. This process will also involve a review of the MDE's core values, such as collaboration, data-driven decision-making, and transparency, to ensure they continue to guide the department's actions and culture effectively.

Goal Setting & Strategy Formulation: Establish strategic goals and develop key initiatives tailored to address educational outcomes, workforce readiness, and technological advancement.

In the Goal Setting & Strategy Formulation stage, we will establish strategic goals that directly address the state's educational priorities. Drawing from the insights gained in our environmental scan and stakeholder surveys, we will develop key initiatives tailored to improve educational outcomes, enhance workforce readiness, and advance technological integration in schools. These goals will be aligned with the MDE's current strategic plan, which has shown significant success, as evidenced by the fact that "93.9% – the largest percentage ever – of Mississippi school districts were rated A, B or C" in 2023-24. We will ensure that our strategies build upon this success while addressing emerging challenges. For instance, we might focus on initiatives to further close achievement gaps, expand early childhood education programs, or enhance STEM education to meet future workforce needs. Each goal and initiative will be designed with clear, measurable outcomes, ensuring they contribute directly to the MDE's overarching mission and vision. This approach will create a robust, actionable strategic plan that guides the MDE's efforts in preparing all Mississippi students for success in an increasingly competitive global environment.

Phase 4: Performance Scorecard Development

KPI Identification: Develop clear Key Performance Indicators (KPIs) aligned with strategic goals to ensure measurable outcomes.

In Phase 4 of our strategic planning process for the Mississippi Department of Education (MDE), we will focus on Performance Scorecard Development, encompassing KPI Identification and Scorecard Design. This phase is crucial for translating strategic goals into measurable outcomes and establishing a robust system for tracking progress.

For KPI Identification, we will work closely with MDE leadership to develop a set of clear, relevant, and measurable Key Performance Indicators that align directly with the strategic goals established in Phase 3. Drawing from the MDE's current practice of tracking outcomes for each strategic goal, as demonstrated in their Annual Progress Report, we will refine and expand these metrics to ensure comprehensive coverage of all strategic priorities. For instance, if a strategic goal focuses on improving student achievement, we might develop KPIs around standardized test scores, graduation rates, and college readiness indicators. We'll ensure that each KPI is specific, measurable, achievable, relevant, and time-bound (SMART), providing a clear benchmark for success.

Scorecard Design: Design an intuitive performance scorecard to track key metrics, targets, and timelines for continuous performance assessment.

In the Scorecard Design stage, we will create an intuitive and visually appealing performance scorecard that effectively tracks and communicates progress on key metrics, targets, and timelines. This scorecard will be designed to facilitate continuous performance assessment and data-driven decision-making. It will incorporate elements from the MDE's current strategic plan and annual reporting practices, ensuring continuity and familiarity for stakeholders. The scorecard will feature easy-to-understand visual representations of data, such as charts and graphs, allowing for quick interpretation of progress towards goals. We'll also include functionality for drilling down into specific metrics for more detailed analysis. This comprehensive scorecard will serve as a powerful tool for the MDE to monitor its performance, identify areas for improvement, and demonstrate accountability to stakeholders, aligning with the department's commitment to data-driven decision-making and transparency.

Phase 5: Stakeholder Engagement and Refinement

Workshops and Feedback: Conduct stakeholder workshops to refine the strategic plan and scorecard based on gathered feedback, ensuring actionable, compliance-driven strategies.

In Phase 5 of our strategic planning process for the Mississippi Department of Education (MDE), we will focus on Stakeholder Engagement and Refinement, with a particular emphasis on conducting workshops and gathering feedback to refine the strategic plan and scorecard. This phase is crucial for ensuring that our strategies are not only actionable but also compliance-driven and aligned with the needs and expectations of all stakeholders. We will organize a series of interactive workshops involving a diverse group of stakeholders, including educators, administrators, parents, students, community leaders, and policymakers. These workshops will be designed to present the draft strategic plan and performance scorecard, encouraging active participation and constructive feedback. We'll utilize various engagement techniques such as small group discussions, prioritization exercises, and scenario planning to elicit meaningful input. Special attention will be given to ensuring that the strategies align with federal and state compliance requirements, including those outlined in the Mississippi Succeeds plan under ESSA.

Following these workshops, we will carefully analyze the feedback received and use it to refine and enhance the strategic plan and scorecard. This iterative process will ensure that the final product is not only comprehensive and ambitious but also realistic and widely supported. We'll pay particular attention to feedback related to the feasibility of implementation, potential barriers, and suggestions for improvement. This approach aligns with the MDE's current practice of broad stakeholder engagement and its commitment to continuous improvement, as evidenced in its annual progress reports. By incorporating diverse perspectives and ensuring compliance with educational standards and regulations, we aim to create a robust, actionable strategic plan that will effectively guide the MDE's efforts in improving educational outcomes for all Mississippi students.

Phase 6: Implementation and Monitoring

Implementation Roadmap: Draft a thorough implementation roadmap, including monitoring and reporting protocols to track strategic execution and adjust as necessary.

In Phase 6 of our strategic planning process for the Mississippi Department of Education (MDE), we will focus on developing a comprehensive Implementation Roadmap and establishing robust monitoring and reporting protocols. This crucial phase will ensure that the

strategic plan moves from concept to action, with clear mechanisms for tracking progress and making necessary adjustments.

The Implementation Roadmap will provide a detailed, step-by-step guide for executing the strategic plan. It will outline specific actions, timelines, and responsibilities for each strategic initiative, ensuring clarity and accountability across the organization. We will align this roadmap with the MDE's existing operational structures and processes, incorporating key milestones and decision points. The roadmap will also include resource allocation plans, identifying the human, financial, and technological resources required for successful implementation. To support ongoing monitoring and reporting, we will establish a systematic approach that aligns with the MDE's current practice of annual progress reporting. This will include regular data collection processes, quarterly review meetings, and annual comprehensive assessments. We'll develop user-friendly dashboards and reporting templates that allow for tracking of Key Performance Indicators (KPIs) and progress toward strategic goals. These tools will be designed to facilitate data-driven decision-making at all levels of the organization.

Furthermore, we will incorporate flexibility into the monitoring process, allowing for adjustments to the strategic plan as circumstances change or new challenges emerge. This adaptive approach aligns with the MDE's commitment to continuous improvement and ensures that the strategic plan remains relevant and effective over time. By implementing this comprehensive roadmap and monitoring system, we aim to support the MDE in achieving its strategic objectives and ultimately improving educational outcomes for all Mississippi students. Our methodological framework is designed to meet the solicitation's requirements and exceed expectations through innovation and detailed planning, underscoring our commitment to fostering educational excellence in Mississippi. The table below provides the elements of our implementation roadmap includes monitoring and reporting protocols to track strategic execution. This roadmap is designed to be used over a one-year period, divided into quarters.

Quarter	Strategic Initiative	One Year	KPIs	Monitoring Protocol	Reporting Frequency
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Q1	Define Goals	<ul style="list-style-type: none"> - Conduct stakeholder meetings - Set SMART objectives - Align with organizational vision 	<ul style="list-style-type: none"> - Number of objectives set - Stakeholder approval rate 	Weekly progress checks	Monthly Report
Q2	Resource Allocation	<ul style="list-style-type: none"> - Identify required resources - Assign roles and responsibilities - Create budget 	<ul style="list-style-type: none"> - Budget utilization - Team member engagement 	Bi-weekly resource audits	Bi-monthly Report
Q3	Implementation	<ul style="list-style-type: none"> - Execute planned actions - Monitor progress - Address challenges 	<ul style="list-style-type: none"> - Milestone completion rate - Adherence to timeline 	Daily task tracking	Weekly Report
Q4	Evaluation & Adjustment	<ul style="list-style-type: none"> - Assess overall progress - Gather feedback - Make necessary adjustments 	<ul style="list-style-type: none"> - Goal achievement rate - Stakeholder satisfaction 	Monthly performance reviews	Quarterly Report

Project Timeline And Key Milestones

The strategic plan and performance scorecard development will be executed in a phased approach over one year. Our timeline shown below is structured to meet the Mississippi Department of Education's objectives and deliverables efficiently:

This timeline aligns with the department's objectives and deliverables as outlined below.

Phase	Timeline	Milestones
1. Project Initiation and Planning	Feb - Mar 2025	Kick-off Meeting - Establish project scope and stakeholder roles Project Work Plan - Develop and approve comprehensive work plan
2. Environmental Scan and Data Collection	Apr-May 2025	SWOT Analysis - Conduct a detailed analysis of capabilities and challenges Stakeholder Surveys - Collect insights through surveys and interviews
3. Strategy Development	Jun - Jul 2025	Strategy Formulation - Facilitate sessions to set goals and identify initiatives KPI Development - Establish Key Performance Indicators
4. Performance Scorecard and Drafting	Aug - Sep 2025	Design Scorecard: - Develop a user-friendly scorecard for tracking outcomes Draft Strategic Plan - Compile and review draft with stakeholders
5. Finalization and Handover	Oct - Nov 2025	Final Strategic Plan and Scorecard - Integrate feedback and finalize documents Stakeholder Presentation - Present final deliverables to the Board

6. Implementation and Monitoring	Dec 2025 - Jan 2026	Implementation Roadmap: - Outline steps for executing the strategic plan Monitoring Protocols - Establish methods for continual assessment
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This timeline aligns with the MDE's current practice of annual progress reporting and the implementation of the updated Accountability System planned for the 2025-26 school year. It also allows for the development of a comprehensive support system for D/F-rated schools based on the updated Accountability System starting in 2026-27.

Stakeholder Engagement Strategy

LMcIntosh Career Consulting is committed to effective stakeholder engagement through our comprehensive strategy that aligns with the Mississippi Department of Education's objectives.

Approach for Stakeholder Engagement

Our approach to stakeholder engagement for the Mississippi Department of Education's strategic planning process is centered around multi-layered engagement tactics designed to cultivate active participation and feedback from a diverse group of stakeholders, ensuring the strategic plan's success.

Comprehensive Stakeholder Mapping

Identification: We will identify key stakeholders including board members, educators, policymakers, and community leaders. This ensures representation from all vital sectors of the education ecosystem.

We will begin with comprehensive stakeholder mapping, identifying key stakeholders including board members, educators, policymakers, and community leaders. This process will ensure representation from all vital sectors of the education ecosystem.

Classification: Organize stakeholders based on their influence, interest, and participation level, tailoring our engagement strategies accordingly.

We'll then classify stakeholders based on their influence, interest, and participation level, using tools such as the Power-Interest Grid and the Influence-Interest Diagram. This classification will allow us to tailor our engagement strategies accordingly.

Engagement Workshops and Interactive Discussions

Workshops: Host a series of interactive workshops that encourage open dialogue and collaborative input on strategic goals and initiatives. Our seasoned facilitators, skilled in cross-

cultural awareness, will ensure that all voices are heard and valued. Our engagement workshops and interactive discussions will form the core of our stakeholder involvement strategy. We'll host a series of interactive workshops that encourage open dialogue and collaborative input on strategic goals and initiatives. These workshops will be designed to create a safe and inclusive environment that respects and values each stakeholder's input. Our seasoned facilitators, skilled in cross-cultural awareness, will ensure that all voices are heard and valued.

Feedback Mechanisms: Develop systems to continually incorporate stakeholder feedback into the planning process, ensuring the strategic plan reflects collective insights and consensus.

To gather comprehensive stakeholder input, we'll employ various methods including surveys, interviews, focus groups, and online platforms. We'll ensure confidentiality and provide opportunities for anonymous input to encourage honest and transparent participation. This multi-faceted approach will allow us to capture diverse opinions and feedback effectively.

Cross-Cultural Communication Expertise

Our team will employ strategies that emphasize cross-cultural communication, vital for bridging diverse opinions and fostering an inclusive planning environment. Leveraging our expertise will ensure that all communications are respectful and effective, accommodating various cultural perspectives.

Diversity, Equity, and Inclusion

We are committed to fostering an inclusive, equitable, and diverse environment where everyone feels valued, respected, and empowered to contribute their unique perspectives. We recognize that diversity in all its forms including but not limited to race, ethnicity, gender identity, sexual orientation, age, ability, socioeconomic status, and cultural background enriches our organization and strengthens our mission. From one nonprofit to another we believe that working together, we envision a future where equity is the standard, inclusion is the norm, and diversity is celebrated as a strength. Together, we aim to build an environment that reflects these values where everyone can thrive prosper, and contribute to meaningful change.

Regular Updates and Transparent Communication: Maintain transparency by providing regular updates on the strategic plan's progress and modifications, creating a feedback loop that enhances stakeholder trust and buy-in.

We will develop systems to continually incorporate stakeholder feedback into the planning process, ensuring the strategic plan reflects collective insights and consensus. This will involve analyzing and synthesizing the input received and identifying common themes, priorities, and concerns. Throughout the process, we'll maintain transparency by providing regular updates on

the strategic plan's progress and modifications. This creates a feedback loop that enhances stakeholder trust and buy-in. We'll also acknowledge and celebrate the contributions of stakeholders, reinforcing their engagement and commitment. By following this comprehensive approach, we aim to create a strategic plan that is not only robust and effective but also widely supported and owned by all stakeholders in Mississippi's education system.

Overall, our stakeholder engagement strategy maximizes involvement through structured, inclusive, and culturally aware methods that align with the project's objectives. LMcIntosh Career Consulting is committed to delivering a strategic plan that unites all stakeholders under a common vision for educational excellence in Mississippi.

Data Collection Mechanisms

System Integration: Develop or integrate robust data collection systems to facilitate real-time tracking of KPI outcomes.

To support the Mississippi Department of Education's strategic planning efforts, we propose implementing a comprehensive data collection mechanism that integrates robust systems for real-time tracking of Key Performance Indicators (KPIs) and enables continuous improvement through iterative data analysis. We will develop or integrate a centralized data management system that seamlessly collects and aggregates data from various sources across the education ecosystem. This system will interface with existing platforms such as the Mississippi Student Information System (MSIS), assessment databases, and human resource management systems to ensure a holistic view of performance metrics. Real-time data collection will be facilitated through automated data feeds, API integrations, and user-friendly input interfaces, allowing for up-to-date tracking of KPI outcomes.

The system will feature customizable dashboards and reporting tools that provide stakeholders with instant access to relevant data visualizations and analytics. These tools will be designed to support different levels of data granularity, from high-level overviews for executive decision-making to detailed breakdowns for operational analysis.

Continuous Improvement: Enable iterative data analysis to identify areas for improvement and adjust strategies as necessary.

To enable continuous improvement, we will implement an iterative data analysis process. This will include regular data quality checks, trend analysis, and predictive modeling to identify areas for improvement and potential challenges before they escalate. The system will also

incorporate machine learning algorithms to detect patterns and anomalies in the data, providing insights that might not be immediately apparent through traditional analysis methods.

Furthermore, we will establish a feedback loop that allows for strategy adjustments based on data-driven insights. This will involve setting up automated alerts for significant deviations from KPI targets, scheduling regular review sessions with key stakeholders, and creating action plan templates for addressing identified issues.

By implementing these data collection mechanisms, the Mississippi Department of Education will be well-equipped to track progress toward its strategic goals, make informed decisions, and continuously refine its strategies to improve educational outcomes across the state.

Monitoring and Reporting

Regular Updates: Implement regular monitoring sessions and reporting mechanisms to inform all stakeholders of progress.

To ensure effective monitoring and reporting for the Mississippi Department of Education's strategic plan, we propose implementing a comprehensive system that provides regular updates and maintains adaptability in the face of changing educational landscapes.

We will establish a structured schedule of monitoring sessions, including monthly progress reviews, quarterly in-depth analyses, and annual comprehensive evaluations. These sessions will involve key stakeholders from various levels of the organization, ensuring a holistic view of progress towards strategic goals. To facilitate these reviews, we will develop user-friendly dashboards that provide real-time updates on Key Performance Indicators (KPIs), allowing for quick identification of areas requiring attention or celebration of successes.

Reporting mechanisms will be tailored to different stakeholder groups, ensuring that information is presented in the most relevant and actionable format. For instance, executive leadership will receive high-level summary reports focusing on overall strategic progress, while operational teams will receive more detailed reports specific to their areas of responsibility. We will utilize a mix of reporting formats, including written reports, interactive digital dashboards, and visual presentations, to cater to diverse preferences and needs.

Adaptability: Establish protocols for reviewing and adapting the scorecard in response to changing educational landscapes and challenges.

To maintain adaptability, we will establish clear protocols for reviewing and adjusting the scorecard in response to emerging challenges or shifts in the educational landscape. This will include a formal annual review process to assess the continued relevance and effectiveness of each KPI and strategic objective. Additionally, we will implement a mechanism for stakeholders to propose adjustments to the scorecard throughout the year, ensuring that the strategic plan remains responsive to real-time needs and opportunities. We will also integrate external data sources and trend analysis into our monitoring process, allowing for early identification of potential impacts on the strategic plan. This proactive approach will enable the Mississippi Department of Education to anticipate and respond to changes in the educational environment, such as policy shifts, technological advancements, or demographic changes. By implementing these monitoring and reporting mechanisms, we aim to create a dynamic and responsive strategic management system that keeps all stakeholders informed, engaged, and aligned with the department's goals while maintaining the flexibility to adapt to an ever-changing educational landscape.

Our methodical approach to performance scorecard development ensures that the Mississippi Department of Education meets its strategic objectives and does so with accountability and precision, reinforcing our role as a leader in developing effective performance management tools.

[Implementation And Monitoring Plan](#)

LMcIntosh Career Consulting will ensure the effective implementation and ongoing monitoring of the strategic plan for the Mississippi Department of Education through a meticulously structured approach. Our strategy supports the educational mission, ensuring accountability and performance excellence.

Implementation Strategy and Detailed Roadmap

Initial Preparation: Begin with a comprehensive planning phase to finalize timelines, assign responsibilities, and set clear expectations for each stakeholder involved.

The Implementation Strategy Detailed Roadmap for the Mississippi Department of Education's strategic plan is designed to ensure a smooth and effective execution over 12 months. The roadmap will begin with a comprehensive Initial Preparation phase, focusing on finalizing timelines, assigning responsibilities, and setting clear expectations for all stakeholders. This phase is crucial for establishing a strong foundation for the implementation process.

Role Assignment: Designate specific roles for team members, ensuring clarity in duties and accountability for deliverables.

Following this, the roadmap outlines specific stages of implementation, each with assigned roles and clear deliverables. The stages include Strategy Communication, Resource Allocation, Action Plan Execution, Monitoring and Evaluation, and Adjustment and Refinement. Each stage has designated team members responsible for specific tasks, ensuring clarity in duties and accountability for deliverables. This structured approach allows for a systematic rollout of the strategic plan, with built-in checkpoints for assessment and adaptation. The table below is a roadmap and provides a structured approach to implementing the strategic plan, ensuring clear responsibilities, timelines, and deliverables throughout the process.

Phase	Timeline	Key Activities	Responsible Roles	Deliverables
Initial Preparation	Month 1	<ul style="list-style-type: none"> - Finalize implementation timeline - Assign team roles - Set stakeholder expectations 	Project Manager, Executive Team	<ul style="list-style-type: none"> - Detailed project schedule - Role assignment document - Stakeholder communication plan
Strategy Communication	Month 2-3	<ul style="list-style-type: none"> - Develop communication materials - Conduct stakeholder briefings - Launch an internal awareness campaign 	Communications Director, Department Heads	<ul style="list-style-type: none"> - Communication toolkit - Stakeholder briefing reports - Internal campaign materials
Resource Allocation	Month 4-5	<ul style="list-style-type: none"> - Assess resource requirements - Allocate budget and personnel - Procure necessary tools/technology 	Finance Director, HR Director, IT Manager	<ul style="list-style-type: none"> - Resource allocation plan - Budget approval document - Procurement report
Action Plan Execution	Month 6-9	<ul style="list-style-type: none"> - Implement strategic initiatives - Conduct training programs - Launch new processes/systems 	Department Heads, Project Teams	<ul style="list-style-type: none"> - Initiative progress reports - Training completion records - System launch documentation
Monitoring and Evaluation	Month 10-11	<ul style="list-style-type: none"> - Track KPI progress - Conduct mid-term review - Gather stakeholder feedback 	Data Analyst, Evaluation Team	<ul style="list-style-type: none"> - KPI dashboard updates - Mid-term review report - Stakeholder feedback summary
Adjustment and Refinement	Month 12	<ul style="list-style-type: none"> - Analyze implementation results - Identify areas for improvement - Refine strategies as needed 	Executive Team, Project Manager	<ul style="list-style-type: none"> - Implementation analysis report - Strategy refinement proposals - Updated strategic plan

Strategic Plan Execution

Phase Deployment: Implement the strategic plan in phases, starting with priority initiatives identified during stakeholder engagement sessions.

The Strategic Plan Execution for the Mississippi Department of Education will be implemented through a phased approach, prioritizing initiatives identified as critical during stakeholder engagement sessions. This phased deployment allows for a focused and manageable rollout of the strategic plan, ensuring that resources are allocated effectively and that early successes can build momentum for subsequent phases.

We will begin by launching the highest-priority initiatives, which may include programs to improve student proficiency in core subjects, enhance teacher effectiveness, or strengthen early childhood education programs. These initial phases will be carefully selected based on their potential for immediate impact and alignment with the department's most pressing goals. Each phase will have clearly defined objectives, timelines, and success metrics to ensure accountability and measurable progress.

Resource Allocation: Ensure optimal use of resources by aligning them with strategic initiatives, focusing on high-impact areas.

Resource allocation will be meticulously aligned with these strategic initiatives, focusing on high-impact areas identified through data analysis and stakeholder input. We will conduct a comprehensive resource assessment to identify available human, financial, and technological resources. This assessment will inform a detailed resource allocation plan that optimizes the use of existing assets and identifies areas where additional resources may be needed.

For human resources, we will assign skilled personnel to lead each initiative, ensuring that teams have the necessary expertise and capacity to drive success. Financial resources will be budgeted and distributed based on the prioritized phases, with a focus on initiatives that promise the highest return on investment in terms of educational outcomes. Technological resources will be deployed strategically to support data-driven decision-making and enhance the efficiency of implementation processes. Throughout the execution process, we will maintain flexibility in resource allocation, allowing for adjustments based on ongoing performance evaluations and changing circumstances. This adaptive approach ensures that resources can be quickly reallocated to address emerging challenges or capitalize on new opportunities.

By implementing this phased deployment strategy with carefully aligned resource allocation, we aim to maximize the impact of the strategic plan, ensuring that each initiative receives the support it needs to succeed while maintaining overall progress toward the Mississippi Department of Education's long-term goals.

Monitoring And Progress Plan

Key Performance Indicators (KPIs): Establish KPIs that align with strategic objectives to provide measurable outcomes and continuous monitoring.

The Monitoring Plan for the Mississippi Department of Education's strategic plan implementation is designed to ensure continuous tracking, evaluation, and improvement of our initiatives. This comprehensive approach integrates robust progress tracking systems, regular review meetings, and clear reporting and accountability mechanisms.

Data Collection Tools: Use robust data management systems to track progress, address issues promptly, and report outcomes comprehensively.

Our progress tracking systems are built around carefully established Key Performance Indicators (KPIs) that directly align with our strategic objectives. These KPIs provide measurable outcomes that allow for continuous monitoring of our progress. To support this, we will implement robust data management systems that enable real-time tracking of these indicators. These tools will facilitate prompt identification and addressing of issues, as well as comprehensive reporting of outcomes. The data collection tools will be integrated across departments to ensure a holistic view of our progress and to minimize data silos.

Regular Review Meetings

Regular review meetings form a crucial part of our monitoring plan. We will conduct structured bi-monthly check-ins with key stakeholders, including department heads, project managers, and representatives from various educational sectors. These meetings will serve as forums to evaluate progress, discuss challenges, and recalibrate strategies as needed. Additionally, we will hold annual performance reviews to assess our achievements against our strategic goals. These in-depth reviews will ensure we maintain alignment with our long-term objectives and allow us to make necessary adjustments for the upcoming cycle.

Reporting and Accountability

Transparent Communication: Maintain regular and transparent updates to stakeholders through detailed reports and dashboards.

Reporting and accountability are central to our monitoring plan. We are committed to maintaining transparent communication with all stakeholders through detailed reports and interactive dashboards. These will provide clear, accessible information on our progress, challenges, and successes.

Feedback Mechanism: Encourage continual feedback from stakeholders to enhance the strategic plan and address real-time concerns effectively.

Furthermore, we will implement a robust feedback mechanism that encourages continual input from stakeholders at all levels. This will allow us to enhance our strategic plan in real-time, addressing concerns and capitalizing on opportunities as they arise. By implementing this comprehensive monitoring plan, we aim to create a dynamic, responsive system that ensures the successful execution of our strategic initiatives while maintaining flexibility to adapt to the evolving educational landscape in Mississippi.

This proposal was crafted to ensure that the Mississippi Department of Education can achieve its long-term educational goals efficiently. LMcIntosh Career Consulting is committed to supporting the department with dedicated expertise and adaptive strategies to foster an environment of ongoing improvement and excellence in education.

[Risk Management Plan](#)

LMcIntosh Career Consulting is committed to identifying and mitigating potential risks associated with implementing the strategic plan and performance scorecard for the Mississippi Department of Education. Our proactive approach ensures we address challenges efficiently and align with the department's mission.

Potential Risks and Mitigation Strategies

To address potential risks in the strategic planning process for the Mississippi Department of Education (MDE), we have developed a comprehensive risk management plan aligned with the department's objectives and operational framework.

Project Delays: We recognize the risk of timeline delays due to unforeseen circumstances or resource unavailability. To mitigate this, we will implement a robust project management framework that includes contingency planning. This approach aligns with the MDE's commitment to data-driven decision-making and continuous improvement. We will

incorporate buffer timelines and maintain resource flexibility to accommodate potential delays without compromising the overall project objectives.

Stakeholder Engagement Challenges: Acknowledging the importance of comprehensive stakeholder input, as emphasized in the MDE's strategic plan, we will address the risk of engagement difficulties by initiating early stakeholder involvement through targeted workshops. We will maintain continuous communication channels and leverage our cross-cultural communication expertise to ensure inclusive participation, reflecting the diverse educational community in Mississippi.

Data Privacy and Security: In line with the MDE's focus on strengthening cybersecurity measures and modernizing data systems, we will adopt stringent data security protocols that comply with all relevant legal standards. Regular audits and IT security assessments will be conducted to safeguard the integrity and confidentiality of data, aligning with the department's commitment to world-class data systems.

Resource Allocation Issues: To mitigate the risk of insufficient or misallocated resources, we will conduct periodic resource reviews and adjust allocations as needed. This approach supports the MDE's goal of effective resource utilization and aligns with the department's focus on providing comprehensive support systems for schools and districts.

Performance Measurement Accuracy: We will develop clear, measurable Key Performance Indicators (KPIs) that align with the MDE's strategic goals. We will implement rigorous validation processes for performance data and utilize comprehensive data analytics tools. This approach supports the MDE's commitment to transparency and accountability in tracking progress towards educational improvements.

By implementing these risk mitigation strategies, we aim to ensure a smooth and effective strategic planning process that aligns with the Mississippi Department of Education's goals and operational standards. Our risk management plan underscores our proactive approach to managing challenges and our commitment to delivering a successful strategic planning initiative for the Mississippi Department of Education. Through continuous monitoring and adaptive strategies, LMcIntosh Career Consulting aims to mitigate risks effectively and support the department's educational objectives.

Past Performance

We have a demonstrated and strong track record of delivering effective strategic planning services, evidenced by our successful engagements across various sectors. Our extensive experience in management consulting showcases our capability to handle complex strategic initiatives.

Previous Projects and Outcomes

LMcIntosh Career Consulting offers comprehensive strategic planning services tailored to their client's needs. We develop actionable strategic plans that align organizational missions with strategic goals, driving growth and achieving long-term objectives for numerous clients. We focus on solving tough challenges for organizations to manage their competitive growth and performance improvement gaps and provide world-class training to help organizations navigate and function in global and intercultural environments, offering an integrated view of global business principles and practices. Our work has led to improved operational efficiencies and enhanced performance for clients, showcasing their expertise in strategic planning and implementation. Our team of experts offer training programs to include case examples and practical applications across diverse business development subject matter.

In terms of core capabilities, our team integrates data analysis and market insights to formulate KPIs and performance management systems tailored to client specifications. This approach ensures that strategic plans are rigorously monitored and effectively executed. We employ innovative strategies to address workforce challenges. In addition, we offer training in various areas such as global business principles, intercultural environments, and practical applications, demonstrating our capability to provide comprehensive strategic planning support. These examples underscore our proficiency in strategic planning and confirm our commitment to delivering high-quality services that meet and exceed client expectations. Our methodologies are tailored to navigate the complexities of strategic implementation, ensuring that educational organizations like the Mississippi Department of Education can achieve their strategic objectives.

Certifications and Compliance

LMcIntosh Career Consulting upholds a robust compliance framework, supported by a suite of certifications that affirm our capability to meet and exceed state and federal contracting standards. As a Minority-Owned and Women-Owned Small Business, we are uniquely

positioned to bring diverse perspectives and inclusive strategies to the Mississippi Department of Education's strategic planning initiatives.

Compliance with Regulations

LMcIntosh Career Consulting adheres strictly to all federal regulations mandated for government contracting, ensuring full accountability and ethical standards in every aspect of our operations. We meet all state-specific requirements for Mississippi, guided by a deep understanding of the educational ecosystem and regional regulatory landscapes. Our strong compliance ethos and diverse certifications position us as an ideal partner for driving effective and equitable change in educational environments. Our qualifications empower us to support the Mississippi Department of Education with integrity and professionalism, reinforcing our commitment to strategic excellence.

COMPONENT 2 - ADMINISTRATION

Project Management

A dedicated project manager from LMcIntosh Career Consulting will oversee each phase, ensuring adherence to timelines and benchmarks. Our team will include strategic planning, data analysis, and stakeholder engagement experts, emphasizing seamless integration and alignment with educational goals.

This structured approach, focused on strategic milestones and resource efficiency, will ensure the successful delivery of a comprehensive strategic plan aligned with the contract's requirements and MDE's objectives.

Experience and Qualifications

LMcIntosh Career Consulting brings unparalleled strategic planning and performance management expertise to the Mississippi Department of Education. With over 15 years of management consulting experience, our firm has effectively partnered with various educational institutions, providing tailored strategic solutions that have proven transformative.

Relevant Experience

Our team is proficient in facilitating stakeholder engagement and fostering consensus among diverse groups, which is essential for developing strategic plans in the educational sector. We have successfully devised comprehensive strategies that include environmental scans, SWOT analyses, and performance indicator establishment. Our proposal for this contract fully aligns with the Mississippi Department of Education's strategic objectives and timelines, reaffirming our steadfast dedication to achieving the highest standards of educational outcomes.

References

Tab 3 – References must meet the requirements as outlined in the References section List up to a minimum of three (3) clients. For each client, the list must specify:

Client Name:	Local Education Agency Partnership (LEAP)
Title:	Adena Hill, ESQ
Location Address:	13310 St Ervin Ave
E-mail Address:	adena@leaptsl.com

Phone Number:	(213) 249-1007	
The type of work your company provided to the client: Strategic and Sustainability Planning for TSL grant project. Included organizational restructuring for Human Capital Management Systems (HCMS) alignment.		
Project Lead/Point of Contact:	Deloise McIntosh	
Contract dates (beginning and end dates):	January 2023	August 2024
Client Name: River Rouge School District		
Title:	Dr. Derrick Coleman, Superintendent	
Location Address:	1460 Coolidge Hwy, River Rouge, MI 48128	
E-mail Address:	derrick.coleman@riverrougeschools	
Phone Number:	(313) 297-9600	
The type of work your company provided to the client: Strategic and Sustainability Planning for the TSL grant project. Included organizational restructuring for Human Capital Management Systems (HCMS) alignment.		
Project Lead/Point of Contact:	Vivian Palmer	
Contract dates (beginning and end dates):	January 2022	June 2023
Client Name: Texas Serenity Academy		
Title:	Hagmon Simmons, Superintendent	
Location Address:	8500 Sweetwater Ln, Houston, TX 77037	
E-mail Address:	hagmons@sbcglobal.net	
Phone Number:	(281) 226-2108	
The type of work your company provided to the client: Strategic and Sustainability Planning for TSL grant project. Included organizational restructuring for Human Capital Management Systems (HCMS) alignment for Texas Education Agency (TEA) charter school renewal requirement.		
Project Lead/Point of Contact:	Vivian Palmer	
Contract dates (beginning and end dates):	August 2019	October 2020

COMPONENT 4 – OTHER

Performance Scorecard Development

LMcIntosh Career Consulting is expertly equipped to craft a comprehensive performance scorecard for the Mississippi Department of Education that effectively tracks and manages strategic goals. Our performance management approach integrates best practices in establishing measurable indicators and ensuring continuous progress evaluation.

Process for Creating Measurable Indicators and KPI Identification

Strategic Alignment: We identify Key Performance Indicators (KPIs) that align with each strategic goal of the MSDE's new plan.

To align Key Performance Indicators (KPIs) with the Mississippi Department of Education's (MDE) strategic goals, we'll focus on measurable outcomes that directly reflect progress toward each goal. Based on the MDE's 2023-2027 Strategic Plan, here are KPIs aligned with each strategic goal:

Goal 1: All Students Proficient and Showing Growth in All Assessed Areas

- Percentage of students passing the 3rd-grade reading assessment at first administration
- Percentage of students scoring proficient (levels 4 and 5) on statewide assessments in grades 3-8 and high school composite
- Percentage of students demonstrating growth on statewide assessments

Goal 2: Every Student Graduates from High School and is Ready for College and Career

- Graduation rate
- Percentage of students meeting college and career readiness benchmarks
- Number of students earning industry-recognized credentials

Goal 3: Every Child Has Access to a High-Quality Early Childhood Program

- Percentage of children enrolled in high-quality early childhood programs
- Kindergarten readiness scores

Goal 4: Every School Has Effective Teachers and Leaders

- Teacher retention rate
- Percentage of teachers rated effective or highly effective
- Number of teachers completing professional development programs

Goal 5: Every Community Effectively Uses a World-Class Data System to Improve Student Outcomes

- Percentage of districts utilizing the Mississippi Student Information System (MSIS)
- Number of data security incidents reported
- User satisfaction rate with data system accessibility and functionality

Goal 6: Every School and District is Rated C or Higher

- Percentage of schools and districts rated C or higher
- Number of schools improving their letter grade or increasing points within a grade
- Reduction in the number of schools in Districts of Transformation

Measurability: Ensure that each KPI is quantifiable, providing clear metrics for progress tracking and accountability.

These KPIs are quantifiable, allowing for clear tracking of progress towards the MDE's strategic goals. They align with the outcomes and focus areas outlined in the MDE's strategic plan and annual progress reports, ensuring relevance and accountability in measuring the effectiveness of the department's initiatives.

Scorecard Design

Visual Representation: Design an intuitive scorecard that visually displays how each KPI contributes to achieving strategic objectives.

Based on the search results and the Mississippi Department of Education's strategic goals, We designed an intuitive scorecard that visually displays how each KPI contributes to achieving strategic objectives. Below is a table format of a “Sample Scorecard” design:

Strategic Objective	KPI	Target	Timeline	Responsibility
Improve Student Proficiency	% of students scoring proficient on statewide assessments	75%	Annually	Curriculum Directors
Increase Graduation Rates	Graduation rate	90%	Annually	High School Principals
Enhance Early Childhood Education	% of children enrolled in high-quality early childhood programs	80%	Quarterly	Early Childhood Coordinator
Develop Effective Teachers	Teacher retention rate	85%	Annually	HR Department
Improve Data System Usage	% of districts utilizing MSIS	100%	Monthly	IT Department
Elevate School Ratings	% of schools rated C or higher	95%	Annually	District Superintendents

This scorecard design includes:

1. Strategic Objectives aligned with the MDE's goals

2. Specific KPIs for each objective
3. Clear targets for performance expectations
4. Timelines for measurement frequency
5. Assigned responsibilities for accountability

This visual representation allows for easy tracking of progress toward strategic goals and facilitates clear communication of performance expectations across the organization. The scorecard includes specific metrics, targets, timelines, and assigned responsibilities to facilitate clear communication of performance expectations.

COMPONENT 3 – PRICE

Cost Proposal

This proposal leverages LMcIntosh Career Consulting's extensive experience to guarantee that the MSDE receives exceptional value, with a focus on accountability and achieving strategic objectives efficiently. Our proposed cost structure ensures transparency while affirmatively meeting the project's financial constraints.

Justifications for Account/Project Management, Materials and Supplies, Equipment, Travel, Marketing, and Communication Supports.

The proposed supports for the Mississippi Department of Education's strategic planning project are essential for ensuring its successful execution and alignment with federal and state requirements. The Account/Project Management component reflects the critical need for specialized expertise in project management, strategic planning, and stakeholder engagement. This expertise is vital for navigating the complex educational landscape, ensuring legal compliance, and effectively coordinating the various elements of the strategic planning process. The allocation of Materials and Supplies is crucial for facilitating effective stakeholder workshops and data collection processes, which form the backbone of our inclusive and comprehensive approach to strategic planning. These materials will enable us to conduct engaging, productive sessions that capture diverse perspectives and insights.

The Equipment provision is necessary to ensure that project presentations and workshops are conducted with a high degree of professionalism and efficiency. This includes audiovisual equipment for clear communication of complex ideas and data visualization tools for presenting analytical findings. The Travel and Expenses allocation accommodates the essential requirement of being physically present in Jackson, MS, for key meetings and stakeholder engagements. This face-to-face interaction is crucial for building trust, fostering collaboration, and gaining a nuanced understanding of local educational contexts and challenges.

Lastly, Marketing and Communication support is critical for ensuring that the project meets all federal acquisition regulations and contractual obligations. This includes developing clear, compliant communication materials, maintaining transparent reporting mechanisms, and effectively disseminating the strategic plan to all relevant stakeholders. By investing in these supports, we ensure a robust, compliant, and effective strategic planning process that will drive meaningful improvements in Mississippi's education system.

Budget Category	Description	Amount
Account Management + Project Execution	Timeline & deliverables management, budget management, project execution. (Includes staffing costs for Project Manager, Strategic Consultants, Legal/Compliance Officer, Data Analysis Systems Engineer, Marketing and Communication etc)	\$312,500.00
Supplies + Technical Workshops, Conferences and Other Indirect Costs	Office supplies, technical material costs and specialized software	\$14,750.00
Travel	Staff travel for meetings and site visits	\$44,350.00
Marketing and Communication	Design, printing, digital publication	\$20,000.00
Total Project Cost		\$391,600.00

Conclusion

LMcIntosh Career Consulting is uniquely qualified to partner with the Mississippi Department of Education in crafting a forward-looking strategic plan and a performance scorecard. Our expertise in management consulting, augmented by our certifications as a Minority-Owned and Women-Owned Small Business, ensures that we bring diverse and innovative solutions. Throughout this proposal, we have detailed our comprehensive approach to stakeholder engagement, implementation, and risk management, underscoring our ability to meet and exceed the project's requirements. Focusing on measurable outcomes, our methodology integrates data-driven strategies and performance tracking to foster educational excellence. We are committed to achieving the Department's accountability and strategic alignment objectives, leveraging our proven capabilities and dedication to every aspect of the project. Our proposal aligns with the Department's mission and exemplifies our commitment to supporting Mississippi's educational framework with integrity and precision. LMcIntosh Career Consulting stands ready to transform the strategic vision into impactful results.

RESUME ATTACHMENTS

DELOISE MCINTOSH
107 Wethersfield Drive, Madison, MS 39110
C: (517) 214-3586 | E: lmcintoshconsulting@gmail.com
website: lmcintoshconsulting.com

PROFESSIONAL EXPERIENCE SUMMARY

Results-oriented leader and strategic planner with over 25 years of proven success in collaborative decision-making, relationship building, and workforce development across business, government, nonprofit, and educational sectors. Skilled in developing and implementing comprehensive frameworks that drive measurable outcomes and accountability. Strong ability to navigate federal grant requirements, foster partnerships, and deliver innovative solutions that address organizational goals and evolving priorities.

PROFESSIONAL QUALIFICATIONS

- Strategic Planning Expertise: Demonstrated success in developing, aligning, and implementing strategic plans that meet district missions and goals.
- Grant Administration: Proven ability to implement and oversee federal and state grant requirements, including development, monitoring, and compliance.
- Data-Driven Decision Making: Extensive experience utilizing data analysis to drive program improvements, retention strategies, and sustainable outcomes.
- Collaboration and Leadership: Strong interpersonal and leadership skills to build relationships and foster collaboration among diverse stakeholders, including educators, administrators, business partners, and community organizations.
- Project Management: Comprehensive knowledge in project planning, scheduling, tracking, and reporting to ensure timely delivery of initiatives to ensure accountability.
- Workforce Development: Expertise in creating pathways for internships, apprenticeships, and career development for underrepresented and at-risk populations.

EDUCATIONAL EXPERIENCE

- Bachelor's Degree-Business Management/Cornerstone University
- Certified National Trainer
- Certified Career Coach

PROFESSIONAL EXPERIENCE

LMcIntosh Career Consulting, Madison, MS.
President/CEO

Nov 2014 - Present

- Leads initiatives that support school districts, community colleges, universities, businesses, and nonprofit organizations with strategic planning, grant development, and program sustainability.
- Developing comprehensive frameworks for career readiness, internships, and job shadowing focusing on underrepresented and at-risk students.
- Building partnerships and providing customized solutions to ensure alignment with organizational missions and measurable outcomes for the future

Teacher and School Leader Grant, Detroit, MI

Oct 2021 - Sept 2024

Implementation Specialist

- Delivering implementation services to three school districts under the TSL Grant.
- Assisting district and school leadership with strategic grant activities, including data collection, human capital management, and performance-based systems.
- Aligning goals with measurable outcomes to improve teacher and principal effectiveness.

**LMcIntosh Career Consulting, Jackson, MS
President/CEO****Nov 2014 - Present**

- Leads initiatives that support school districts, community colleges, universities, businesses, and nonprofit organizations with strategic planning, grant development, and program sustainability.
- Developing comprehensive frameworks for career readiness, internships, and job shadowing focusing on underrepresented and at-risk students.
- Building partnerships and providing customized solutions to ensure alignment with organizational missions and measurable outcomes for the future

West Jackson Community Development Center, Jackson, MS**May 2021- Nov 2021****Job Developer Youthbuild DOL Grant**

- Cultivated meaningful relationships with youth and young adults aged 16-24 who are not in school or employed, supporting their personal and professional growth.
- Guided individuals lacking a high school diploma, connecting them with resources to achieve educational milestones and secure meaningful employment.
- Built partnerships with businesses and industries to create job opportunities for program graduates, fostering long-term career success.
- Delivered comprehensive services including coaching, mentoring, and skill development to empower youth with education and employment readiness.
- Facilitated training in resume writing, interview preparation, and job search strategies, equipping participants with essential soft skills for workforce integration.

**Tukwila School District, Tukwila, WA
Mar 2018****Nov 2015 -****Consulting Specialist**

- Developed and implemented a comprehensive strategic plan to establish internships, apprenticeships, and cooperative education programs in collaboration with the Tukwila School District.
- Designed structured career pathways with clear outcomes, including increased student participation, certification attainment, and dual enrollment opportunities with local colleges and universities.
- Led workshops and training sessions focused on employability skills, career readiness, and industry best practices to prepare students for certification and workforce entry.
- Established key performance indicators (KPIs) to measure success, tracking student placement rates, credential completion, and post-secondary enrollment.
- Strengthened partnerships with industry leaders and educational institutions to create sustainable career and technical education initiatives that drive long-term student success.

**ITT Technical Madison, MS.
Director of Career Services****Feb 2014 - Oct 2014**

- Ensured department compliance with government and accreditation regulations through effective oversight and adherence to policies.
- Directed all facets of career services, including job search, coaching, job placement, resume development, career planning, workshops, interview preparation, salary negotiations, and professional networking.

Key Achievements

- Exceeded placement objectives within the first four months of employment.
- Achieved first place in student placements for six consecutive months within the district

**Lansing Community College, Lansing MI
Implementation Specialist/Coach****Sep 2014 - Jun 2012**

- Led the development and implementation of the Information Technology Apprenticeship Program, funded by the National Science Foundation (NSF), connecting students with employers to provide hands-on job opportunities.
- Strategically facilitated the execution of career education and transition programs, ensuring collaboration between educational institutions and industry partners to enhance student career readiness.
- **Notable Achievements**
- Strategically placed over 157 students in internships and apprenticeships, successfully navigating Michigan's declining auto economy to secure employment opportunities.
- Developed and executed a strategic framework for the Advanced Technological Education (ATE) Grant, overseeing all reporting, documentation, and compliance to meet program objectives.
- Designed and implemented targeted training programs and established a network of prospective employers, driving employment success rates of 30-40% annually for work-ready clients.
- Optimized employer hiring processes, increasing efficiency by 43% through the development of a specialized database of qualified students.
- Expanded student program enrollment by 38% through strategic partnerships with high schools, special events, targeted marketing, classroom visits, and community outreach.
- Developed a structured career pathway leading to a Department of Labor Certificate, creating a direct pipeline for students to secure entry-level positions with the State of Michigan.
- Recognized by the State of Michigan for leadership and the successful impact of the program.
- Spearheaded strategic engagement initiatives, organizing events and activities to attract students and employers to the program.
- Ensured fiscal responsibility and compliance, managing grant guidelines, budgeting, and regulatory adherence to support program sustainability.

**Lansing Community College
Interim Director of Career Employment Service****Sept 2011 - May 2012**

- Managed the Career Services Department in the director's absence, overseeing daily operations and ensuring the department met its objectives.

- Led recruitment, hiring, and training of new employees, facilitating staff meetings, and conducting grant reviews to maintain program effectiveness.
- Cultivated and maintained relationships with external employers, developing new partnerships to expand job placement opportunities and enhance career services.
- Supported grant implementation as a front-line assistant, coordinating all aspects of grant activities, ensuring compliance with the work plan, and achieving key grant objectives.

Lansing Community College, Lansing MI.**Feb 2009 - May 2013****Adjunct Faculty**

- Leveraging strong communication skills to teach a diverse group of traditional and non-traditional working adults through online courses.
- Developed and maintained a comprehensive knowledge base for an online teaching platform (ANGEL), enhancing the learning experience for students.
- Fostered an engaging virtual learning environment, guiding students through a dynamic workforce experience via chat, discussion boards, email, and phone, ensuring effective communication and support.

AWARDS, CERTIFICATES, PRESENTATIONS, AND RECOGNITIONS*Awards*

- Best Practice Award, IT Apprenticeship Placement, National Association of Information Technology

Certificates

- Certified National Trainer
- Certified Online Adjunct Instructor-Lansing Community College (2009)
- Certified Career Coach/Michigan Department of Labor (2012)
- Certificate of Participation as an Active Team Coach/Own A Business, Own Your Future Lansing Community College (2009-2010)
- Certificate of Appreciation/IT Apprenticeship Program/Lansing Community College (2013)

Presentations

- **Presenter:** Advanced Technological Conference. National Science Foundation/Washington DC (2009-2012)
- **Presenter:** Broaden Impact Conference Washington, DC (2012)
- **Presenter:** High Impact Technology Exchange Conference, Presenter San Diego Presenter
- **Presenter:** Advanced Technological Conference Principal Investigators Conference, Washington DC (2012)

Recognitions Learning Experiences for Internships and Apprenticeships:

- <https://atecenters.org/webinar-archives-2016/>
Board Member/STEM Advancement Mississippi Robotics

VIVIAN PALMER RESUME

EDUCATION AND CREDENTIALS

Wayne State University, Detroit, MI	Master of Education	Math Education – Instructional Technology
University of Detroit-Mercy, Detroit, MI	Bachelor of Arts	Math Education-Computer Science
Saint Leo University, Saint Leo, FL	Associate of Arts	Business Administration

PERSONAL STATEMENT

I am a versatile leader and entrepreneur with extensive experience in K-12 education, serving as a teacher, administrator, consultant and CEO of small businesses that support the professional field of education, with a history of maximizing resources and continuously-improving program delivery and promotion of emerging programs to address economic needs of high need organizations, specifically in comprehensive public and charter school environments to encourage, inspire, and strengthen school improvement, individual growth student performance, and staff development in the public education, with a vision to provide culturally responsive educational systems to drive continuous improvement of teaching practices, leadership practices and organizational practices as the precondition for student learning.

POSITIONS AND APPOINTMENTS

LMcIntosh Consulting

2021 – Present *Organizational and Strategic Consultant*

- Established partnerships with schools, districts, and non-profit agencies to develop sustainable support systems for continuous performance improvement for educators, leaders, and support staff development, and performance support.
- Develops training and development, strategic and organizational, and communications plans for a variety of demographics and audiences.
- Daily management and facilitation of online communities to create high engagement and deliver actionable insights to clients through social media awareness and communication.
- Managed grant proposal initiatives/RFP, and inquiries, that fostered strategic partnerships to create professional development campaigns to improve organizational engagement and awareness.
- Engaged in college/university partnerships that help to prepare educators for certification and career ladder growth.

The Goodlife Agency, Detroit, MI

2018 - Present *Chief Executive Office and Co-Founder*

- Provides professional consulting services—specializing in business development, organizational change management strategies, and customized training and support.
- Translate client business priorities into objective-based approaches to achieve their goals. Responsible for diagnosing complex needs into streamlined strategies that leverage a mix of standard and non-traditional organizational systems design and communications methods that match their strategic growth and align with their audience.
- Daily management and facilitation of online communities to create high engagement and deliver actionable insights to clients through social media awareness and communication.
- Creates, manages, and grow the client’s digital presence through full-scale brand campaigns using Facebook, YouTube, Twitter, paid and organic SEO, and Google Analytics to increase audience, engagement, and sales.
- Develops and implemented organizational rebrands, marketing videos and print collateral. Created content for media kits, press releases, blogs, articles, and copy for traditional and digital marketing collateral.
- Develops training and development, strategic and organizational, and communications plans for a variety of demographics and audiences.
- Develops and managed business development and sales strategy initiatives to grow the client base and revenue of the agency.
- Event management and planning for client industry events for 150 - 10,000 people.
- Manages organizational growth and development over \$40M in private investment and grant funding for clients over 15 years, in the education, food and beverage, tech startup, and lifestyle fitness industry.

Local Education Agency Partnership (LEAP), Detroit, MIJanuary 2024 - Present *Chief Executive Office and Founder*

- National non-profit agency that provides grants management, project management, technical assistance, leadership, and administrative direction for the efficient and effective fiduciary monitoring of an 8-million-dollar, U.S. Department of Education, Teacher and School Leader (TSL) grant.
- Established partnerships with schools, districts, and non-profit agencies to develop sustainable support systems for continuous performance improvement, educators, leaders, staff development, and performance evaluation reform.
- Providing intentional, sustainable, and quality educational and training investments in educators will result in well-prepared students.
- Impacted more than 300 educators and 3,000 students, from across Metro Detroit (Detroit, Flint, Harper Woods, Highland Park, and River Rouge).
- Managed grant proposal initiatives/RFP, and inquiries, that fostered strategic partnerships to create professional development campaigns to improve organizational engagement and awareness.
- Engaged in college/university partnerships that help to prepare educators for certification and career ladder growth.

Wayne County Community College, Detroit, MIAugust 2018-Present *Adjunct Professor*

- Mathematics instructor and facilitates instruction online and classroom instruction for college-level and dual enrollment programming for students

Shoreline Community College, Shoreline, WAAugust 2017 – June 2018 *Technical Program Reviewer*

- Served as technical reviewer to assist with designing, developing, and implementing a technical review to assess industry input for the Clean Energy workforce and regarding high-performance building trends and community college educational requirements.

Tukwila School District, Tukwila, WA2015-2017 *Executive Director-Accountability, Assessment, and Technology*

- Improved federal and regulatory compliance for federal Perkins grant from “high risk” to “sustainable” in one year, while serving as Career Technical Education Program Director.
- Improved federal and regulatory compliance for federal Perkins grant from “high risk” to “sustainable” in one year, while serving as Career Technical Education Program Director.
- Facilitated key College and Career Readiness program initiatives as a means of informing the decision-making and strategic plan benchmark measures for continuous performance and improvement.
- Directed the preparation and administration of all state and district assessments, organizational systems analysis, and staff productivity for accountability as well as the development of accountability reports for school, district, state, and federal levels.
- Organized and evaluated Zero Hour and after-school community learning programs to align strategic initiatives for timely student intervention support,
- Developed academic and enterprise strategic goals, prepared short and long-range plans, and implemented guidance, tools, and services for grant reporting and comprehensive program evaluations to monitor efficiency and cost-saving opportunities.
- Structured analysis of district-wide enrollment projections, student demographic analysis, certificated and classified staffing growth plans, and evaluation data/information dissemination timeline for baseline, quarterly, and annual reporting.

Education Achievement Authority, Detroit, MI2014-2015 *Executive Director-Grants Management and Data Analysis*

- Provided project management, technical assistance, leadership, and administrative direction for the efficient and effective fiduciary monitoring of a \$43 million, U.S. Department of Education, Teacher Incentive Fund (TIF) grant.
- Assessed and awarded over 1.5 million dollars in TIF-funded pay for performance incentives to 600 eligible educators to support the performance-based compensation system (PBCS) by the district priorities and grant requirements.
- Managed training and professional development requirements proposed in the grant.

- Coordinated with Curriculum, Assessment, Human Resources, and Finance divisions to establish proposed priorities, requirements, definitions, and selection criteria to improve student achievement in high-need schools by creating incentives for improving effective teaching and leadership practices in twelve K-12 comprehensive schools.

2013-2014 Chief Technology Officer (Interim)

- Established and implemented computing and information technology strategic plans, and operating policies and managed over \$3 million in state, federal, and bond grant funding for schools/districts in the greater Detroit area.
- Managed instructional and enterprise processes and schedules to ensure that technology is managed and utilized efficiently and cost-effectively.
- Provided leadership and direction in the development of 20-50 technical staff in the implementation of a new state-wide school district's operation and maintenance of the district's information systems, computer services, network communications, and management information services to accomplish strategic goals and objectives.
- Managed over 6 million dollars in classroom and enterprise technology assets.

2013-2014 Teaching and Learning Specialist (Contractor-School Improvement Network)

- Designed and developed a curriculum for K-12 Learning Management System for 10,000 students and 600 educators.
- Managed and supported district teacher professional development performance evaluation management system that increased employee engagement from 25% to 85%.
- Delivered quality technical training and professional development to instructional coaches, teachers, and principals using appropriate research-based models and tools.

Palmer Consulting, LLC, Detroit, MI

2003-2018 Chief Development Officer/President

- Full-service consulting firm specializing in personal and professional development, training, and change management strategies. Created incredible opportunities to broaden horizons and enrich the lives of learners at a variety of organizations to maximize performance by offering expert consulting and a rich inventory of services. Servicing Midwest (MI, OH, IL, NY, DC) and Northwest (CA, WA) regions.

Ann Arbor Public Schools, Ann Arbor, MI

2012-2015 Information and Instructional Technology Specialist

- Provided technical assistance in support of the \$4 million, American Recovery and Reinvestment Act (ARRA) grant to purchase, assistive technology resources and develop and implement assistive technology training for high-poverty schools or students with disabilities.
- Managed over \$1.5 million in tangible assets and financial resources.

Southfield Public Schools, Southfield, MI

2011-2013 Information and Instructional Technology Specialist

- Provided technical assistance, training, and program evaluation in support of the \$2.9 million, American Recovery and Reinvestment Act (ARRA) grant to implement advanced and innovative school reform initiatives for school improvement.
- Reviewed, monitored, and evaluated services provided by external agencies according to district priorities and grant requirements.

Michigan Association Of Public-School Academies (MAPSA), Lansing, MI

2010-2011 Technical Support Specialist

- Provided technical assistance supporting the \$20 million, U.S. Department of Education, Teacher Incentive Fund (TIF) grant for teacher and principal pay for performance initiative.
- Assessed and awarded over 500 thousand dollars in Teacher Incentive Fund TIF funded to pay for performance incentives to 1200 eligible educators across 25 charter schools, to support a performance-based compensation system (PBCS) by the district priorities and grant requirements.

Macprofessionals, Novi, MI

2009-2010 Account Executive-K-12 Educational Sales

- Assisted in developing and implementing a new sales delivery model for educational technology sales for public and private school sectors.

- Increased Mid-West client base by 40% and annual sales by 25%, supported by the acquisition of \$1.5 million in state and federal educational funding.
- Certified Promethean and SMART Interactive White Board training and implementation specialist.

Detroit Public Schools, Detroit, MI

1994-1998 High School Math Teacher
 1998-2002 Career Technical Education (CTE)/Adult Education Instructor
 2002-2004 School and District Technology Coordinator
 2004-2009 Education and Instructional Technology Training Administrator

Early Experience

1989-1994 **The Coastal Bank**, Georgia - New Accounts Supervisor
 1987-1989 **Army/Air Force Exchange Services**, Alaska - Operations Manager
 1986-1987 **First Financial Savings and Loan**, Texas - Administrative Assistant
 1984-1986 **United States Government**, Germany - Administrative Assistant

PROFESSIONAL CONTRIBUTIONS

As an experienced professional with a BA in Math Education and MS in Instructional Technology, along with 30 years of experience in K12 education. I have uniquely positioned myself to make significant contributions to small business development and education sectors. My expertise bridges the gap between business development, strategic and organization planning, workforce development, grants management, mathematics, and educational technology, allowing me to leverage innovative approaches to enhance organizational growth, learning, and continuous performance improvement.

CLIENT PORTFOLIO

Eagles Nest Academy, George Washington Carver Academy, Harper Woods School District, River Rouge School District, Tukwila School District, Detroit Employment Solutions Corporation, Detroit Area Agency on Aging, Detroit Wayne Health Integrated Network, Petram Data, Kamala Harris For the People, Biden For President, Elizabeth Warren for President 2020, YES Inc, March For Our Lives, Open Streets Detroit, Tech Jobs Tour, Lesbians Who Tech, Lutheran Services in America, Regulatory Compliance Association, Hillary Clinton for America, Terri's Cakes Detroit, The Trap Studio, The Charles H. Wright Museum of African American History, Digital Roots, Ellis Island Tea, Eat Comfort Cafe, Live Cycle Delight, Ann Arbor Michigan Public Schools, Harper Woods Schools, River Rouge School District, Harper Woods School District, Madison & Madison International, BucketFeet, Posh and Popular Fashion and Beauty Summit, Michigan Funders, and more. Servicing Midwest (MI, OH, IL, NY, DC) and Northwest (CA, WA) regions.

AFFILIATIONS AND ASSOCIATIONS

- American Society for Training and Development (**ASTD**)
- Association for Career and Technical Education (**ACTE**)
- American Evaluation Association (**AEA**)
- Detroit Wayne Integrated Health Network (**DWHIN**) Committee/Board
- International Society for Performance and Instruction (**ISPI**)
- National Alliance of Black School Educators (**NASBE**)
- National Small Business Association (**NSBA**), Technology Council
- Michigan Association of Computer Users in Learning (**MACUL**)
- Microsoft Technology Education and Learning Support (**TEALS**)
- Science Buddies Community of STEM Educators
- Tech Town – Detroit Business Contributor/Member
- Two-Way Interaction in Education (**TWICE**)
- Washington Association for Career and Technical Education (**WA-CTE**)
- Wayne State University (**WSU**), College of Education, Alumni Board

PROFESSIONAL SUMMARY

Results-focused, Accredited Management Consultant with over 15 years of experience helping organizations optimize their strategic planning and execution. Experienced leader with extensive leadership and operational execution across sectors, industries, and geographies, collaborating with international organizations, governments, NGOs, and private companies. Highly dependable, ethical, and reliable support specialist who blends advanced organizational, technical, and business acumen. Works effectively with cross-functional teams to ensure operational and service excellence. An analytical problem-solver proficient in using independent decision-making skills and sound judgment to impact company success. Known for delivering actionable insights and building lasting client partnerships that drive measurable business outcomes.

KEY COMPETENCIES

- Strategic Planning
- Team Management
- Technical Proficiency
- Organizational Strategy
- Analytical Skills
- Critical Thinking
- Project Management
- Research and Analysis
- Problem-Solving
- Interpersonal Skills
- Relationship Building
- Training & Development

WORK EXPERIENCE

Strategy Consultant Nov 2024 – Present
LMcIntosh Consulting

Offer strategic consulting services to clients aimed at enhancing their organizations' performance and competitive advantage.

- Analyze complex business data, financial statements, and operational metrics to evaluate organizational performance and potential.
- Develop strategic frameworks and recommendations to address business challenges and capitalize on growth opportunities.
- Lead strategic planning sessions and workshops with executive teams.
- Build and maintain strong relationships with client stakeholders at all levels.

Independent Expert Evaluator Jan 2016 – Dec 2022
Executive Agency for Small and Medium-sized Enterprises (EASME)
European Commission, Brussels, Belgium (Remote/Contractor)

Utilized my extensive expertise in industry and business to help maximize the efficiency and impact of the European Commission's €79 billion research and innovation program covering a broad range of fields such as science, technology, business management, innovation, and project management.

- Evaluated Horizon 2020/SME Instrument Program proposals and exchanged views with fellow evaluators.

- Ensured EU grants are awarded to the best research and innovation proposals based on a rigorous peer-review process.

Senior Consultant

April 2009 - Present

IBS Global Consulting, Inc.

Leverage my management consulting expertise to drive the organizational growth of government entities and organizations by implementing strategic transformations, developing comprehensive roadmaps, managing change processes, and training cross-functional teams, leading to improved operational efficiency and sustainable revenue growth.

- Provide management consulting, technical assistance, and training to strengthen organizational capacity.
- Oversee end-to-end strategy projects from initial scoping to final implementation.
- Develop data-driven frameworks that align business objectives with market opportunities.
- Maintain good business relationships with high-level federal, state, and municipal governments as well as with the CEO's and directors of leading companies.
- Mentor junior consultants and analysts.

EDUCATION

Executive Diploma: Management Consulting

Feb 2010 - Dec 2012

Grenoble Ecole de Management – Grenoble, France

- Completed coursework in Corporate Business Process, Organizational Consulting, Creative Management for Consultants, and Managing a Successful Consulting Practice. The program focused on the challenges of the consulting profession and provided an understanding of the consulting process, together with the skills necessary to lead international consulting projects.
- Completed a real-life consulting assignment and a 25,000-word written report.

Master of Business Administration (MBA): International Business

Sept 2007 - Sept 2009

Walsh College – Troy, Michigan USA

- Completed coursework in Management and Organization, Operations Management, International Management, Financial Management, Strategic Management Concepts, International Entrepreneurship, Effective Leadership and Business Ethics, and Global Economics.
- Studied abroad in Riga, Latvia, at the University College for Economics and Culture; Dubai, United Arab Emirates, at the American University in Dubai; and Chengdu, China, at the Southwestern University of Finance and Economics.

Bachelor of Business Administration: Marketing, Advertising and Promotion

Sept 2004 - May 2006

Davenport University – Dearborn, Michigan USA

- Completed coursework in Public Relations, Media Planning, Consumer Behavior, Social Diversity, Marketing Research, Report Writing, Integrated Marketing Communications, Strategic Marketing, Creative Strategies, International Marketing, and Advertising.

- Completed the AMA Detroit Marketing Mentoring Program presented by the American Marketing Association (AMA).

PROFESSIONAL CERTIFICATIONS

- **Accredited Management Consultant® (AMC)**, International Management Consultants Certification Board, Global Academy of Finance and Management – December 2016

REFERENCES

Excellent references available upon request.

Mississippi Department of Education Strategic Planning Proposal

Prepared by Lumen Impact Group



Proposal Cover Page (Appendix A)

Appendix A – Proposal Cover Sheet

Company/Name: Lumen Impact Group, Inc.

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Amy Ruck Kagan, Managing Partner
Mailing Address	3250 St. Andrews Dr.
City, State, Zip	Mount Pleasant, MI 48858
Telephone:	(901)488-4548
E-Mail Address:	amy@lumenimpactgroup.com

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? _____
3. Are you currently registered with ~~PayMode~~ YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called ~~PayMode~~. In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: Lisa Diaz/Founder Date: 2/4/2025

Component 1: Plan of Action

Lumen Impact Group appreciates the opportunity to submit the following proposal in support of the strategic planning process at the Mississippi Department of Education.

ABOUT LUMEN IMPACT GROUP

Lumen Impact Group (Lumen) is a certified Minority-Owned, Woman-Owned, Small business that is dedicated to empowering individuals, teams, and organizations to think strategically and achieve their greatest impact. We partner with clients to chart a clear path forward and equip their teams to implement it, because the world needs their greatest impact.

Our proprietary strategic planning model has continued to be refined for the past thirteen years. It blends proven methods with best practices from group facilitation, adult learning, and implementation science. Grounded in research and refined through years of expertise, we use qualitative and quantitative data to create actionable strategies that align with organizational goals. By engaging stakeholders and assessing organizational dynamics, we ensure plans are practical, impactful, and ready for implementation.

Collaboration, diverse voices, and continuous feedback drive our work, resulting in sustainable, measurable success. Our evidence-based approach supports strategic decision-making and execution, delivering clear roadmaps and fostering long-term growth. Clients often share that their time with Lumen is marked by clarity, alignment, and transformational "ah-ha" moments that energize their teams and fuel progress. Every engagement is tailored to the unique needs of the organization, its mission, and its people. At Lumen, we help clients overcome obstacles, seize opportunities, and unlock their full potential.

For the Mississippi Department of Education (MDE), our approach will emphasize aligning strategies with MDE's goals, addressing systemic challenges and supporting measurable progress in student outcomes. Our collaborative process ensures stakeholder engagement at all levels to deliver actionable plans that resonate with MDE's vision and drive long-term success.

Team Experience & Skills

Lumen Impact Group's strategic facilitators have decades of experience working with organizations of all sizes and scopes, ranging from single-site schools to state government agencies and elected/appointed boards to nonprofits with national and international reach. Our work spans mission-driven and government systems, giving us a deep understanding of the complexities involved in implementing change within these environments. We collaborate with partners like MDE to introduce best-in-class, evidence-informed practices and tools that create meaningful outcomes for communities and students.

While Lumen Impact Group was founded just five years ago, our roots in strategic planning run much deeper. Our founder, Lisa Diaz, has been developing and refining our Strategic Planning process for 13 years, supporting nearly 100 organizations in creating and executing impactful strategic plans. This extensive experience forms the foundation of our approach, allowing us to support organizations in developing the theory, infrastructure, and strategies to create real and lasting change.

Over the past five years, Lumen Impact Group has maintained an average team size of six employees. As our impact and scope of work have grown, so has our team. Today, we have expanded to a team of eight dedicated professionals, further enhancing our capacity to support mission-driven organizations and government entities in achieving their strategic goals.

Our team includes:

- Researchers who bring best-in-class methodology to designing inclusive, actionable data collection and stakeholder engagement analysis;
- Facilitators with expertise in organizational culture, adult learning for diverse teams, impactful session design, and facilitation of engaging team sessions;
- Operations and project management specialists to design and support the use of actionable tools that will keep your plans moving forward; and
- A dedication to ensuring representative voices shape the process and that collaboration with communities drives meaningful, lasting impact.

Lumen's Strategic Planning Approach

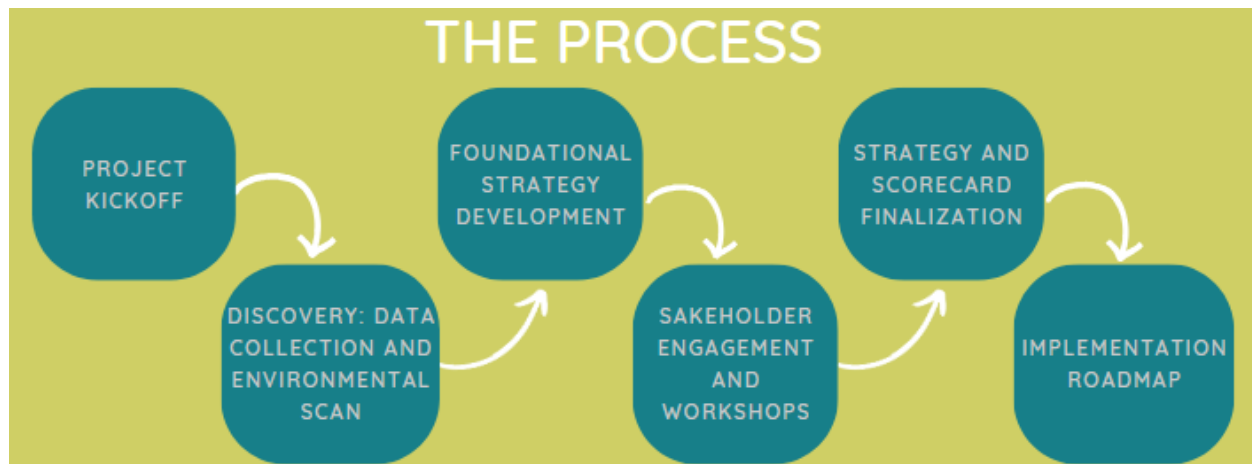
Though every organization we have supported is unique, the following elements remain consistent:

- We believe **feedback** is essential to organizational development;
- We believe **partnerships** are a key element in reaching and/or exceeding goals;
- We believe taking the **time** to wrestle through key strategic decision points in a respectful and efficient way is the key to lasting impact;
- We believe connecting strategy to **action** is essential to ensure strategic plans don't just gather dust;
- We believe the most effective strategic plans are built in **collaboration** with visionary leaders and implementation leaders. Bringing together a mix of strategic and tactical thinkers allows the development of a strategy that is visionary and attainable; and
- We believe that intentionally structuring decision-making to honor and privilege **diverse voices** leads to a stronger plan that will provide the most impact for all students.

Our strategic planning process will help MDE generate much more than a document; it will create alignment, clarity, and a shared commitment to action among all stakeholders. The outcomes will include:

- A **shared understanding** of the current and desired future state of education in Mississippi.
- A **long-term strategy** with actionable goals, objectives, and measurable metrics.
- A **robust engagement process** with internal and external stakeholders, including educators, families, policymakers, and community partners.
- **Concrete strategies** to address MDE's challenges and opportunities.
- Governance and administrative **systems for ongoing implementation** and monitoring of the strategic plan.

The following illustrates how each aspect of planning is critical to the success of the creation and implementation of the strategic plan. The “flow” will be adapted to meet MDE’s needs and scope structures.



We have the background and experience to help MDE connect planning to action, identify when strategic course correction should be considered, and plot the most productive strategic course forward.

PROPOSED SCOPE OF WORK: MISSISSIPPI DEPARTMENT OF EDUCATION

Situational Analysis

The Mississippi Department of Education (MDE) stands at a pivotal juncture in its mission to create a world-class educational system that supports students in achieving academic success and equitable opportunities. As outlined in the RFP, MDE has made significant strides in several critical areas, including early childhood education, teacher preparation, and improved graduation rates. Yet, pressing challenges persist, such as addressing over 3,000 teacher vacancies, combating chronic absenteeism, and ensuring equitable access to high-quality education in rural and underserved communities.

Through this strategic planning initiative, MDE seeks to establish a framework that not only builds on its current successes but also addresses systemic inequities that hinder progress. To achieve this, MDE requires a strategic planning partner capable of integrating data-driven insights, inclusive stakeholder engagement, and actionable strategies. Lumen is uniquely positioned to help MDE achieve these goals through our evidence-based approach, collaborative methodology, and commitment to fostering diverse, equitable, and inclusive practices in education.

This initiative will enable MDE to solidify its leadership in the national educational landscape while empowering schools, educators, and communities to meet the needs of Mississippi’s diverse student population.

Strategic Planning High Level Overview: From Kickoff to Implementation

Lumen will partner with the Mississippi Department of Education (MDE) to develop a comprehensive and actionable strategic plan through a six-step process. Each phase builds upon the previous one, ensuring the final strategy is informed, tested, and ready for successful implementation.

- Step 1: Project Kickoff and customization of process and protocols to build project foundation.
- Step 2: Discovery and data collection, which includes an environmental scan and analysis of existing data.
- Step 3: Foundational strategy development, which supports your Strategy Development Team (i.e., leadership, board members, select staff and other key stakeholders, etc.) as you make sense of your current state, agree on a vision for your organization's future, and design a path forward. Smaller workgroups will work virtually between strategy sessions to further draft the plan.
- Step 4: Additional focus groups and interviews to engage stakeholders and test the foundational strategy elements using feedback from key stakeholders to help provide additional insight into your organization and provide feedback on overall strengths, weaknesses, opportunities, and threats to the plan being developed.
- Step 5: Using the feedback, the Strategy Development Team will refine the foundational strategy and develop core strategy for implementation.
- Step 6: Support in establishing the associated systems and processes to finalize and implement the strategic plan.

The following scope elaborates on these steps with both the methodology and deliverables of our process aligned to the needs and scope from MDE's request for proposals.

Step 1: Project Initiation and Planning

Timeline: April- May 2025

This phase establishes a shared understanding of the strategic planning process, solidifies timelines and deliverables, and ensures alignment between Lumen and MDE's leadership. The project initiation will include developing a project management plan and a communications strategy to ensure transparency and accountability throughout the engagement.

Methodology:

- Conduct a kickoff meeting with MDE leadership and the designated Strategic Development Team to confirm goals, expectations, timelines, and deliverables. The Strategic Development Team will be determined by MDE leadership with support from Lumen Impact Group to identify the strategic and tactical voices that will build the foundational strategy.
- Develop a detailed project management plan outlining milestones, responsibilities, and communication protocols.
- Initiate data collection framework, including compiling relevant contacts, sources, and timelines.

- Develop a stakeholder engagement plan to ensure continued involvement throughout the process, from strategy formulation to final approval.

Deliverables:

- Finalized project management plan and communication strategy.
- Detailed timeline and milestones for all phases of the strategic planning process.
- A stakeholder engagement plan that spans the life of the strategic planning process and addresses continued engagement, feedback loops, and mechanisms for incorporating stakeholder input into ongoing decision-making. The plan will feed into the ongoing communication strategy.

Step 2: “Discovery”: Environmental Scan and Data Collection

Timeline: May - June 2025

At Lumen Impact Group, we prioritize meaningful stakeholder engagement and inclusion as critical elements of our strategic planning process. Our approach ensures that diverse voices are heard and integrated into the plan. During the Discovery phase, our framework will guide targeted and thorough data collection, resulting in a comprehensive and impactful environmental scan. By working closely with our clients, we capture insights from key stakeholders.

Our process is highly interactive and participatory, fostering engagement and providing accessible options like virtual and in-person sessions. Customized interviews, focus groups, and surveys allow for comprehensive input, which we analyze to highlight key themes and outliers. Our analysis highlights both overarching themes and important outliers, giving a clear and detailed picture of stakeholder insights. We then support our clients in interpreting this data and integrating it into their broader strategy.

The environmental scan will provide a detailed understanding of MDE’s internal and external landscape. This phase will include a SWOT analysis, stakeholder interviews, focus groups, and the review and collection of quantitative and qualitative data to identify challenges, opportunities, and trends.

Methodology:

- Perform an environmental scan of the current educational landscape, including trends, regulations, and technological advancements affecting the state. Additionally, review MDE’s performance data, reports, and existing strategic plans to identify gaps and opportunities for alignment.
- Conduct a SWOT analysis to identify MDE’s internal strengths and weaknesses and external opportunities and threats.
- 15-20 virtual interviews and 5-6 virtual focus groups with key stakeholders, including board members, educators, parents, policymakers, and community leaders.

Deliverables:

- One report detailing results from the environmental scan and the SWOT analysis, including key trends and implications for MDE.
- Stakeholder engagement summary with key themes and insights.

Step 3: Foundational Strategy Development

Timeline: June - July 2025

Following the completion of the Discovery Phase, Lumen Impact Group will support MDE's Strategy Development Team in developing the foundational aspects of the strategic plan. This phase will focus on clarifying and refining the organization's mission and vision to align with the department's overarching goals and stakeholder needs. The team will also identify and prioritize the strategic goals that form the core of MDE's strategy and create a roadmap to achieve them.

Rooted in data collected during the Discovery Phase, this collaborative effort will help the Strategy Development Team assess the department's current state and desired impact, enabling them to articulate a clear and unified vision for the future. Strategic priorities and goals will be defined in a way that bridges the gap between long-term objectives and actionable initiatives, laying a strong foundation for the subsequent phases of the planning process.

Methodology:

- Facilitate a one-day in-person Strategy Development Team workshop to assess and level-set the group on MDE's mission, vision, and desired impact. This workshop will leverage data insights and stakeholder feedback to guide discussions and decision-making.
- Incorporate structured exercises to prioritize and finalize core strategic goals that align with MDE's mission and vision, ensuring a clear path forward.
- Establish smaller workgroups to build on outcomes from the one-day workshop. These work groups will convene virtually 1-2 times for ninety-minute sessions between facilitated meetings to refine specific strategic elements.

Deliverables:

- A shared understanding and alignment on MDE's mission and vision, reflecting the department's core purpose and aspirations.
- Clear definition and prioritization of core strategic goals that will guide future decision-making and resource allocation.
- A deeper understanding of key stakeholder insights and how they inform the department's strategic direction.
- A complete foundational strategy with goals and objectives drafted through work groups to be refined at the next in-person session after stakeholder feedback.

Step 4: Stakeholder Engagement/Strategy Testing

Timeline: July - August 2025

In this phase, the focus shifts to testing the foundational strategy elements by engaging stakeholders, allowing them to learn about the direction of the plan, and gathering additional feedback from key internal and external voices. Building on insights from earlier phases, focus groups and interviews will help the Strategy Development Team refine strategic priorities, goals, objectives, and mission alignment. These activities will engage board members, educators, policymakers, students, and community members (and

others as identified) to gather diverse perspectives on the strategic direction and gain insight on what stakeholders believe success would look like and how it will be measured.

This phase helps confirm that the strategic priorities are ambitious yet attainable, while also allowing staff and partners to see how their expertise connects to the strategy. This collaborative approach solidifies the strategic direction, validating that the plan is sound and responsive to the organization's vision.

Methodology:

- Conduct 4-5 in-person workshops (over the course of a scheduled 1-2 day visit) with key stakeholders to share, discuss, test, and gather feedback on the draft strategic goals, objectives, and Performance Scorecard elements.
- Conduct between 10-20 virtual interviews with key stakeholders to test foundational strategy elements.

Deliverables:

- Comprehensive feedback enables the strategy team to gauge how well the foundational strategy elements resonate with key stakeholders, ensuring alignment with the organization's vision.
- Delivery of an interim report summarizing insights from focus groups, and interviews, respondents.

Step 5: Strategy and Scorecard Finalization (a), Presentation and Handover (b)

Timeline: August – November 2025

(a) Step 5a In the initial steps of this phase, there will be focus on the refinement of the foundational strategy elements based on the feedback from key stakeholders in the testing phase, as well as other members of the Strategy Development Team. After digesting the feedback, work groups will finalize the goals and objectives before tackling metrics of success. With finalized goals and objectives, the team will work to translating MDE's mission, vision, and strategic goals into actionable and measurable outcomes by identifying Key Performance Indicators (KPIs) and designing a robust Performance Scorecard Framework. This step builds on the foundational work of prior phases and incorporates insights from stakeholder feedback gathered during the testing phase. The process ensures that all strategic priorities are clearly aligned with measurable benchmarks and supported by efficient systems for tracking and evaluation.

Lumen will facilitate the identification of measurable KPIs for each strategic goal, ensuring they align with the organization's priorities and drive progress. Additionally, Lumen will design a user-friendly Performance Scorecard Framework to track progress, incorporating clear metrics, targets, timelines, and responsibilities. This framework will serve as a structured tool to guide MDE in monitoring progress, making informed adjustments, and fostering continuous improvement.

To ensure sustainable implementation, we will collaborate with MDE to establish efficient data collection mechanisms that enable ongoing monitoring and evaluation. These mechanisms will provide the Strategy Development Team with the tools and insights needed to measure impact effectively, address challenges proactively, and celebrate successes.

Methodology:

- A full day in-person facilitated session to refine the foundational strategy elements and to define measurable KPIs and align them with strategic priorities.
- Develop a draft Performance Scorecard Framework with metrics, targets, timelines, and responsibilities.
- Meet with workgroups to refine the Scorecard and ensure alignment with MDE's operational processes.

Deliverables:

- Finalized strategic goals and objectives for the final strategic plan.
- A comprehensive set of Key Performance Indicators (KPIs) that reflect MDE's strategic priorities and provide clear benchmarks for success.
- A Performance Scorecard Framework designed to track progress, integrate feedback, and enable strategic alignment.
- A shared understanding among MDE's leadership and Strategy Development Team of how to use the Performance Scorecard to support data-driven decision-making and continuous improvement.

(b) Step 5b The second part of this phase bridges the gap between strategic planning and operational execution, ensuring that MDE's strategic framework is cohesive, actionable, and measurable. This step integrates all components—mission, vision, goals, objectives, and KPIs—into a unified framework that guides the organization's next steps. It also incorporates change management principles to ensure that leadership, staff, and stakeholders are fully prepared for implementation, fostering seamless organizational alignment.

This phase emphasizes refining all strategic elements to ensure clarity, consistency, and representative of stakeholder feedback. Lumen will work collaboratively with MDE leadership and key stakeholders to finalize the plan, establish communication structures, train the appropriate stakeholders, and prepare for implementation. These efforts will prepare MDE for a successful transition to operationalization and execution.

Additionally, we will focus on achieving alignment across all parts of the agency by providing targeted support to leadership and the board. By bridging the strategy development and execution phases, we will help ensure that the strategic plan garners broad buy-in and is embraced as a cohesive roadmap for advancing MDE's vision and priorities.

Methodology:

- Facilitate 1-2, two-hour virtual workshops with the Strategy Development Team to finalize all components of the strategic plan, including mission, vision, strategic priorities, goals, objectives that define key initiatives, KPIs and the Performance Scorecard.
- Deliver a two-hour virtual session focused on designing structures to support change management practices, supporting smooth adoption of the strategic plan across teams and stakeholders.
- Train identified MDE staff, via a half-day in person session, to provide necessary supports to align organizational priorities, utilize and monitor the Performance Scorecard, and foster shared accountability.
- Present a half-day, in person, final strategy session to the board.

Deliverables:

- Finalized Strategic Plan Document.
 - Mission, vision, strategic priorities, goals, objectives, KPIs and Performance Scorecard in both electronic and print formats.
- Final Presentation and training with Board and staff by November 1.

Step 6: Implementation Roadmap and Monitoring Plan

November – End of March 2026

Moving from strategy to implementation is crucial to realizing an organization's vision. Effective operational planning not only outlines the specific action steps needed to advance strategic objectives but also identifies the "who," "when," and "what" resources are required to move these steps forward. This step ensures that strategic priorities are aligned with operational activities, while integrating robust change management processes that align with organizational culture and objectives.

To support the Mississippi Department of Education (MDE) in bridging strategic planning to operationalization, Lumen Impact Group will facilitate a structured and detailed implementation roadmap. This roadmap will provide clear guidance on executing strategic priorities, tracking progress, and maintaining accountability. Additionally, we will establish monitoring and reporting protocols to assess the effectiveness of inputs and outputs, fostering continuous improvement throughout the implementation phase.

By aligning governance, administrative systems, and Performance Scorecards with MDE's objectives, this phase ensures that operational actions are not only efficient but also sustainable, fostering long-term success and organizational transformation.

Methodology:

- Facilitate two full day, in-person implementation sessions (spread throughout the final six months of the engagement) to set the stage for operationalizing strategic priorities within the Roadmap and navigating the associated monitoring tools and templates.
- Conduct monthly virtual work sessions with strategic priority leads to guide the development of year-one operational plans. These plans will define success for key actions and outline a clear execution path, specifying responsibilities, deadlines, and resource needs.
- Design and implement a monitoring and reporting protocol (based on the Performance Scorecard) aligned with MDE's priorities to track the progress of operational activities, ensuring effective input execution and course correction as needed.
- Provide tailored tools and templates, for tracking implementation milestones, ensuring transparency and accountability at every stage.
- Update a communications plan to share the strategy across internal and external stakeholders.
- Provide up to 10 hours a month of virtual leadership coaching to support strategic priority leadership in sustaining momentum, learning from implementation, and other needs that arise during strategy implementation.

Deliverables:

- A detailed Implementation Roadmap that includes actionable steps for year-one priorities, assigned leads, deadlines, and resources needed.
- Fully developed monitoring and reporting protocols to ensure alignment with MDE’s strategic priorities and the ability to adapt in real time.
- Documented operational plans that provide clarity on responsibilities and success metrics for the first year of implementation.
- Teams equipped with tools and practices for sustained strategy execution, ensuring long-term success and impact.
- Routine progress monitoring and evaluation systems that inform decision-making and enable continuous improvement.
- Leadership and staff alignment on strategic priorities, fostering a culture of collaboration and accountability.

Proposed Timeline

SCOPE	ACTIVITY	TIMELINE
Step 1: Project Initiation and Timeline	<ul style="list-style-type: none"> ▪ Conduct a kickoff meeting. ▪ Develop a detailed project management plan ▪ Initiate data collection framework, including compiling relevant contacts, sources, and timelines. ▪ Develop a stakeholder engagement plan that will be used across the entirety of the project. 	April - May 2025
Step 2: Environmental Scan and Data Collection	<ul style="list-style-type: none"> ▪ Perform an environmental scan. ▪ Conduct a SWOT analysis. ▪ Facilitate 15-20 virtual interviews and 5-6 virtual focus groups. 	May - June 2025
Step 3: Strategic Goal Development and Prioritization	<ul style="list-style-type: none"> ▪ One-day, in-person strategy workshop session with the Strategy Development Team. ▪ Draft strategic goals that are ambitious, measurable, and aligned with MDE’s vision for equity and excellence. ▪ Convene virtual workgroups to refine goals and identify key objectives for implementation. 	June - July 2025
Step 4: Performance Scorecard Development, Stakeholder	<ul style="list-style-type: none"> ▪ Conduct 4-5 in-person workshops with key stakeholders. 	July - August 2025

Engagement, and Workshops	<ul style="list-style-type: none"> ▪ Conduct and 10-20 interviews with key stakeholders. 	
Step 5: Strategy and Scorecard Finalization (a), Presentation and Handover (b)	<ul style="list-style-type: none"> ▪ Facilitate an in-person full day Strategy Development Team session to refine strategy and develop KPIs. ▪ Develop a draft of the Performance Scorecard Framework. ▪ Meet with strategy workgroups to refine the scorecard and ensure alignment with MDE’s operational processes. ▪ Facilitate 1-2, two-hour virtual workshops to finalize all components of the strategic plan. ▪ Deliver a two-hour virtual change management session. ▪ Facilitate a half-day in-person training on understanding the strategic plan, using the Performance Scorecard, and fostering accountability. ▪ Present a half day final strategy session to the board. 	August - November 2025
Step 6: Implementation Roadmap and Monitoring Plan	<ul style="list-style-type: none"> ▪ Facilitate full day in-person leadership and implementation sessions. ▪ Lead monthly virtual work sessions with strategic priority leads. ▪ Design and implement a monitoring and reporting system. ▪ Provide tailored tools and templates, for tracking implementation milestones, ensuring transparency and accountability at every stage. ▪ Update a communications plan to share the strategy across internal and external stakeholders. ▪ Up to 10 hours a month of virtual leadership coaching to support strategic priority leadership in sustaining momentum, learning from implementation, and other needs that arise during strategy implementation. 	November – March 2026

Component 2: Administration

Bios and Resumes

Amy Ruck Kagan, Lumen Impact Group, Managing Director

Facilitator • Strategist • Leadership Coach • Organizational Development Specialist

Amy has dedicated her career to ensuring that zip code does not dictate the quality of one's education, working across the public education ecosystem to achieve sustainable and equitable systems improvements. She has been an unrelenting advocate for students and for equity for more than twenty years. Amy brings a keen political savviness, a national and international presence, and strategic relationships and partnerships to all projects. Amy is a visionary leader who thinks outside the box, finds creative and effective solutions, and builds and manages productive and strong teams.

Amy lives in Park City, Utah with her husband and two young sons. Amy is an enthusiastic outdoors-woman who finds solutions while skiing or hiking. Amy is an avid reader, a Peloton enthusiast, and an amateur baker.

Stephanie VanDyk, Lumen Impact Group, Partner

Facilitator • Adult Learning Designer • Lumen Project Manager • Client Liaison

With experience as an educator and consultant, Stephanie guides teams through strategy, team culture, and project implementation. She creates custom experiences for clients as they work through their culture and organizational goals. She fosters relationships and turns client needs into actionable plans through guided, collaborative work time. Stephanie also serves as a project manager and connector of human resources, developing systems and processes for continuous improvement on the Lumen team.

Stephanie lives in West Michigan with her husband and two children. You will most often find them playing in the woods, digging in the dirt, and getting into too many housing and landscaping projects at once. The rest of her free time and brain space are entirely occupied by planting, watering, pruning, splitting, and scheming around perennial and vegetable gardening.

Cori Egan, Lumen Impact Group, Partner

Researcher • Project Manager • Data and Policy Analyst

Cori has worked as a teacher, researcher, project manager, and consultant. Her expertise includes data collection and analysis, school turnaround efforts, and organizational improvement through thoughtful program evaluation, system design, and strategic planning. Cori helps schools, nonprofits and other organizations understand their current state and path forward, coordinates projects among Lumen team members and clients, and leverages talent and capacity to ensure timely completion of deliverables. Cori uses data to zoom in on the policy landscape and to identify organizations' strengths, pain points and opportunities for growth and continuous improvement.

Cori lives in Memphis, Tennessee, with her husband and three children. She loves being outside, playing and watching sports, playing board games with her family, and spending time at the beach whenever possible!

Amy Ruck Kagan, Senior Partner

Amy@lumenimpactgroup.com

(617) 650-7282

Amy is a highly regarded professional with a proven track record of impactful contributions to diverse organizations, including schools, nonprofits, and mission driven businesses. Her expertise in effective leadership, organizational change, strategic planning, intentional culture, management, and systems processes makes her a trusted resource for clients nationwide.

Facilitator:

As a facilitator, Amy is known for her ability to provide fresh perspectives to clients and their work. Through an in-depth analysis, listening to the perspectives of a diverse set of stakeholders, and insightful inquiry, Amy skillfully broadens the horizons of leaders and teams, guiding them with respect and productivity as they navigate their most significant challenges. As a facilitator, Amy:

- Is inclusive
- Is an active and empathetic listener
- Remains impartial and skillfully manages conflicts by encouraging constructive dialogue and finding common ground

Strategist:

Amy is an expert in developing long-term, actionable plans and launching initiatives, products, or services. She has a talent for bringing clarity to complex situations and aligning them with the organization's goals. By using research and data analysis, she helps create practical and effective strategies for organizations to implement. As a strategist, Amy:

- Sees the bigger picture and is able to help connect intricate details
- Develops comprehensive strategies that align with overarching goals and long-term success
- Forges strong relationships across teams and stakeholders, fostering unity and driving collective commitment

Leadership Coach:

As a coach, Amy cultivates leadership strengths through thoughtful, strategic inquiry. She supports both individuals and teams in learning to work effectively together and guides them in creating a supportive, high-energy, and collaborative environment. Amy's leadership coaching helps others:

- Reflect on their individual strengths, challenges, and growth areas, empowering each leader to unlock their full potential
- Explore their aspirations, fears, and ambitions, fostering self-awareness and emotional intelligence
- Refine their strategic thinking and execution capabilities to drive tangible, impact-focused results

Organizational Development Specialist:

Amy possesses a remarkable talent for organizational analysis and development, skillfully guiding leadership coaching and facilitating growth exploration. She excels in establishing clear role definitions, fostering accountability, and aligning expectations across organizations. Moreover, Amy has a proven track

record in designing and implementing effective evaluation systems that drive continuous improvement and support overall organizational development. As an organizational development specialist, Amy:

- Has a proven track record of aligning organizational goals, structures, and processes to optimize efficiency and drive sustainable growth
- Utilizes comprehensive change management strategies that engage stakeholders and creates a plan for success and implementation
- Fosters a culture of collaboration, innovation, and inclusivity within organizations

WORK EXPERIENCE PRIOR TO LUMEN IMPACT GROUP

ARK Consulting, Inc., Independent Consultant

- Developed high quality analysis and evaluation of schools, school networks, and school systems.
- National expert on education reform practice and policy and national education landscape.
- Organizational analysis and development, leadership coaching, and growth exploration.
- Governance assessment, coaching, and training.

NACSA, Chicago, IL Managing Director, Nexus at NACSA January 2018- June 2023

Vice President of Authorizer Engagement and Advancement (AEA)

- Consulted with educators to develop new ideas, advance best practices, and develop as leaders.
- Created and lead professional and leadership development programs.
- Managed grant based and fee-for-service projects.

Highmark School Development Salt Lake City, UT, Director of Portfolio Management, August 2016- January 2018

- Lead business and relationship management processes.
- Built and implemented quality review process for risk analysis and management.

Philadelphia Charters for Excellence (PCE), Philadelphia, Founding Executive Director, April 2015 – August 2016

- Developed and implemented the strategic vision, membership structure, and communications strategy.
- Built a city-wide advocacy platform.

New Jersey Department of Education Trenton, NJ Deputy Chief Innovation Officer, 2011-2015

- Oversaw 90+ charter schools throughout the state. Monitored schools' academic performance, fiscal sustainability, and organizational viability.
- Led the overhaul of the charter school accountability and oversight process.
- Built capacity and knowledge of team members, other departments, legislators, and key state officials through coaching and technical assistance.
- Created a statewide approach to school choice.
- Developed and operationalized a strategic plan that set cross-functional goals aligned with the Department's mission and objectives.

EDUCATION

M.S., Magna Cum Laude, Leadership, Northeastern University, August 2008, Boston, MA

B.A., American Civilization and Elementary Education, Middlebury College, May 2002, Middlebury, VT

Stephanie VanDyk, Partner

stephanie@lumenimpactgroup.com

231.631.1966

Stephanie VanDyk has nearly 15 years of experience as an educator in traditional public and public charter schools and as a member of the Lumen team. Her organization and skill in building relationships add structure and nurture collective vision for clients doing the hard work of creating great impact.

Facilitator

Stephanie fosters connectivity and environments that allow diverse thinkers in varied roles to engage and trust each other. Whether facilitating a team culture retreat or strategic planning process in-person or virtually, Stephanie:

- Sets the pace to keep teams moving forward and attaining quality results
- Asks critical questions to prompt deeper, creative thinking and awareness
- Remains nimble while helping teams work together and achieve their goals

Adult Learning Designer

Stephanie considers desired outcomes first and then maps the needed outputs. She fuels effective learning by:

- Tailoring agendas, resources and materials to the situation and client goals
- Moderating pace and engagement to ensure participants enjoy themselves while gaining insights, knowledge, and commitment
- Combining critical thinking, exploration, and group interactions

Lumen Project Manager

Stephanie's superpower is her ability to move projects forward. Her organization and multitasking brain, honed by years in the classroom, translate to success in managing projects across Lumen. Her process includes:

- Tracking the team, clients, and progress to ensure momentum
- Identifying next steps and deadlines
- Providing ideas and options when teams are stuck and need clarity

Client Liaison

Stephanie serves as the face of many client relationships, generating the connections that produce results. Her energy and big-picture view of the work to be done keep the Lumen team and its clients moving in sync.

WORK EXPERIENCE PRIOR TO LUMEN IMPACT GROUP

Educator and Department Lead, Mt. Pleasant Public Schools, Grand River Preparatory High School, High Point Academy, Spartanburg School District 7

6-12 English and History Teacher, 2010-2019

- Taught Advanced Placement, gifted and talented, on-level, and at-risk students
- Served as department and subject-area lead in building team culture, facilitating meetings, and acting as liaison between teachers and administration

- Developed and implemented a new-teacher mentoring program and served as mentor observing and supporting new teachers in their journey
- Led initiatives to vertically align, develop and train peers schoolwide in new curriculum
- Designed operational elements such as a master schedule and course catalog for a middle school that was adding high school grades
- Ensured compliance in special education instruction, assessment and discipline; supported preparation for Special Education and ESOL audits and the Schools to Watch accreditation.

Educational Testing Services, College Board Advanced Placement Program

Advanced Placement World History Reader 2015 and 2016

- Joined a national cohort of high school and college history instructors to assess the written portion of the AP World History exam
- Participated in professional development and networking through the national AP World History community

EDUCATION

Central Michigan University

Bachelor of Science in Education with a double major in English and History — 2010

VOLUNTEER ROLES

Big Brothers Sisters, D.A. Blodgett, Grand Rapids MI

Big Sister 2013-2016

Cori Egan, Partner

cori@lumenimpactgroup.com

901.488.4548

Cori has worked as a teacher, researcher, project manager and consultant for nearly 15 years. Her expertise includes qualitative data collection and analysis, school turnaround efforts, and organizational improvement through thoughtful program evaluation and strategic planning.

Researcher

Cori helps schools, nonprofits and other organizations understand their current state using data, interviews, surveys and focus groups, then leverages analyses to guide forward momentum. Cori's research efforts:

- Use qualitative and quantitative data to reveal organizations' current states and fuel discussions about what their teams want to be
- Reflect organizational values, goals, and people
- Provide data analyses that spur thoughtful conversations and enlightened decisions
- Generate reports to share with stakeholders
- Inform implementation strategy

Project Manager

Cori coordinates among Lumen team members and clients to push projects forward. Mindful of overarching project goals, Cori leverages available talent and capacity to ensure timely completion of quality deliverables. Her project management process includes:

- Collaborating with clients to understand project needs and identify action steps
- Tapping individual and team strengths
- Tracking timelines and progress and communicating with clients to keep efforts on track
- Implementing processes and using the right tools to foster efficiency

Data and Policy Analyst

Cori collects and analyzes both qualitative and quantitative data to zoom in on the policy landscape, as well as to identify organizations' leverageable strengths, pain points and opportunities for growth, and create avenues for continuous improvement. Cori's analyses help organizations to:

- Uncover themes in organizational culture, stakeholder and employee perceptions and outcomes
- Determine policy options that would bring positive change for stakeholders and communities
- Understand how and why strategies can affect broad change internally and externally

WORK EXPERIENCE PRIOR TO LUMEN IMPACT GROUP

First 8 Memphis

Consultant and Project Manager, 2021- 2022

- Supported learning and operations by writing research briefs, collecting data from pre-K operators and informing/promoting the organization's equity-oriented policy agenda
- Researched early education need, funding streams, enrollment, and other key data points to advance the goal of establishing universal pre-K

- Wrote and designed a manual outlining the program’s design, compliance and quality metrics, and responsibilities of participating pre-K operators

George Washington University

Research Assistant, 2015-2020

- Advanced a multi-year, mixed methods research study of school turnaround in Memphis, Tennessee
- Co-designed the study framework and interview protocols, collected data, and coded and analyzed more than 160 interviews across multiple levels of a school system
- Oversaw the coding process, including training researchers and verifying reliability
- Drew on scholarly texts, policy, and research findings to understand the school turnaround environment and depict the complexities of equity, accountability, and school improvement

Michigan Council for Educator Effectiveness

Project Manager, 2012–2013

- Guided six governor-appointed education experts in deliberating, writing, and marketing statewide recommendations for educator evaluation in Michigan
- Interviewed experts from across the country about implementation of educator evaluation laws; shared the resulting analysis with council members to guide their recommendations
- Built relationships with educators, union representatives, lawmakers, and lobbyists to gather their input and gain support for the council’s work
- Drafted reports, oversaw the editing process, and coordinated submission to the State Board of Education, governor, and Legislature

EDUCATION

University of Michigan, School of Education, Ann Arbor, MI

Master of Arts, Educational Studies, 2011

University of Mississippi, Oxford, MS

Bachelor of Arts, English (minor, Sociology), 2008

Phi Beta Kappa Honor Society, 2008

Appendix C: References

Client Name	Maryland's Accountability and Implementation Board
Contact Name and Title	Rachel Hise, Executive Director
Contact Address	3596 Fontron Dr., Edgewater, MD 21037
Contact Telephone Number	(410) 991-7525
Email Address	rachel.hise@maryland.gov
Type of work provided to the client	Lumen began working with this brand-new state agency when it was a small but mighty team of three FTEs and has continued building their individual and team capacity as the agency has grown in size, scope, and diversity. Lumen played a key role in helping team leaders design and articulate core elements of an effective culture. We led regular team retreats for operational planning and continued refining support routines and practices to foster a positive team environment. Many team members have proactively opted into regular or as-needed executive coaching sessions with Lumen team members, using these sessions to set professional goals, refine their own roles within the team culture, and work on challenging problems of practice. AIB team members will tell you that Lumen leadership development is never sit-and-get; this team of remote employees came together around fun teambuilding activities, engaging challenges, and tough conversations that kept the whole team engaged and moving toward their shared goals. Collaboratively, we generated: a shared commitment to live out organizational values in day-to-day work; transparent and inclusive dialogue around leadership norms and expectations to drive positive team culture; and improved individual capacity to support positive team culture and achieve shared goals.
Effective contract dates for the time frame services were/are being provided to client.	December 2022-Present

Client Name	Maryland Institute for Literacy and Equity (MILE)
Contact Name and Title	Reference: DJ Bolger, MILE Director
Contact Address	7809 Regents Drive, College Park, MD 20742-1541
Contact Telephone Number	301-405-9103
Email Address	djbolger@umd.edu
Type of work provided to the client	Lumen supports this new initiative, including partners from multiple Maryland university systems, in designing their organizational structure and goals while hiring a high-performing team and building a positive

	<p>team culture. MILE needed a partner who understood their role within a complex higher education landscape, but was also prepared to help the team translate their research into actionable technical assistance across the diverse Maryland communities and systems. Lumen has brought the MILE team together for teambuilding and vision setting and provided tailored executive coaching to help leaders identify and meet their challenging goals for team functioning and external impacts. The MILE team would tell you that Lumen is, above all, a fun team to work with. Group sessions are interesting and build on team members' interests and goals and ensure that new hires from all levels and backgrounds have authentic opportunities to share their perspectives, concerns, and ideas.</p>
Effective contract dates for the time frame services were/are being provided to client.	December 2023-July 2024

Client Name	Foundation for Social Connection (F4SC)
Contact Name and Title	Edward Garcia, Board President
Contact Address	601 Massachusetts Ave NW, Suite 520W, Washington, DC 20001
Contact Telephone Number	202-486-7269
Email Address	edward@social-connection.org
Type of work provided to the client	<p>Lumen supported F4SC in building its first strategic plan with a diverse group of stakeholders including board members, higher education researchers, public and private sector partners, leadership, and staff. As a young, scaling organization at the center of an evolving international ecosystem, F4SC needed a plan that defined their role while remaining agile in a constantly shifting field of scientific research, technical assistance, and practice. Lumen guided the team through a planning process informed by robust discovery work and diverse feedback. This ensured alignment with both external needs and internal culture. With research scientists, business executives, and leadership involved, the plan was intentionally facilitated to ensure each stakeholder saw their role in advancing the work. Lumen also provided coaching to help F4SC leaders navigate change and make difficult decisions, ensuring they had the capacity to both write and implement an ambitious strategic plan, with the tools and human capacity to operationalize their goals.</p>
Effective contract dates for the time frame services were/are being provided to client	December 2023- May 2024

Component 3 – Price

SCOPE	DELIVERABLES	COST
Step 1: Project Initiation and Timeline	<ul style="list-style-type: none"> Finalized project management plan and communication strategy. Detailed timeline and milestones for all phases of the strategic planning process. Stakeholder engagement plan. 	\$8000
Step 2: Environmental Scan and Data Collection	<ul style="list-style-type: none"> One report detailing results from the environmental scan and the SWOT analysis, including key trends and implications for MDE. Stakeholder engagement summary with key themes and insights. 	\$15,000
Step 3: Foundational Strategy Development	<ul style="list-style-type: none"> A shared understanding and alignment on MDE’s mission and vision, reflecting the department’s core purpose and aspirations. Clear definition and prioritization of core strategic goals that will guide future decision-making and resource allocation. A deeper understanding of key stakeholder insights and how they inform the department’s strategic direction. A complete foundational strategy draft to be refine in steps 4 and 5. 	\$8,000
Step 4: Stakeholder Engagement/Strategy Testing	<ul style="list-style-type: none"> Interim report summarizing stakeholder feedback and key refinements. 	\$24,000
Steps 5a and 5b: Performance Scorecard and Finalizing and Presenting the Strategic Plan	<ul style="list-style-type: none"> Finalized Strategic Plan documents. Comprehensive set of KPIs. Finalized Performance Scorecard. Shared understanding of Scorecard implementation. Final Presentation and training by August 1. 	\$14,000
Step 6: Implementation Roadmap and Monitoring Plan	<ul style="list-style-type: none"> An Implementation Roadmap that includes actionable steps for year-one priorities, assigned leads, deadlines, and resources needed. Fully developed monitoring and reporting protocols. Documented operational plans. Teams equipped with tools and practices for sustained strategy execution. Routine progress monitoring and evaluation systems. Leadership and staff alignment on strategic priorities. 	\$22,000
Total Fees		\$91,000

Other Fees:

These costs exclude travel for the in-person sessions. For any required travel, Lumen Impact Group will be reimbursed for mileage at the acceptable IRS rate, meal per diems at the acceptable city/state rate where work takes place and will provide receipts for all direct expenses to be reimbursed such as airfare, transportation, and accommodations. Lumen Impact Group will make every effort to make travel expenses fair and reasonable.

Payment Terms:

- 25% will be due upon execution of the agreement,
- 25% will be due on October 30, 2025,
- 25% will be due on January 31st 2026; and
- The final 25% will be due on or before the completion of the project no later than March 31st, 2026.

Component 4 – OTHER

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Contractor represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor's bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The bidder, Offeror, or Contractor represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The bidder certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Contractor's bid or proposal that such Contractor has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Contractor did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Lisa Diaz Title: Founder

Signature: *Lisa Diaz*

Date: 2/4/2025

Modifications or additions to any portion of this document may be cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. *An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.*

Choose one:

____ Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

X Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.



Michael Watson
SECRETARY OF STATE

Office of the Secretary of State
Jackson, Mississippi

Certificate of Good Standing

I, MICHAEL WATSON, Secretary of State of the State of Mississippi, and as such, the legal custodian of the records as required by the laws of Mississippi, to be filed in my office, do hereby certify:

That on the 11th day of December, 2024, the State of Mississippi issued a Charter/Certificate of Authority to:

LUMEN IMPACT GROUP, INC.

That the state of incorporation is Michigan.

That the period of duration is perpetual.

That according to the records of this office, Articles of Dissolution or a Certificate of Withdrawal have not been filed.

That according to the records of this office, a current Annual Report has been delivered to the Office of the Secretary of State.

I further certify that all fees, taxes and penalties owed to this state, as reflected in the records of the Secretary of State, have been paid and that the corporation is in existence or has authority to transact business in Mississippi.

That insofar as the records of this office are concerned, the said Lumen Impact Group, Inc. is in good standing at this time.

Given under my hand and seal of office
the 12th day of December, 2024

A handwritten signature in black ink that reads "Michael Watson".

Certificate Number: CN24202318

Verify this certificate online at <http://corp.sos.ms.gov/corpcnv/verifycertificate.aspx>



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Authorized Signature

Date

Printed Name

Appendix A – Proposal Cover Sheet

Company/Name: Martin's Career Coaching & Learning Little People

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	<u>Dr. Erica J. Littleton, Chief Education Officer</u>
Mailing Address	<u>PO BOX 310994</u>
City, State, Zip	<u>Birmingham, AL 35231</u>
Telephone:	<u>(205) 673-8534</u>
E-Mail Address:	<u>ericajewel@learninglittlepeople.com</u>

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? ___ YES NO
2. If known, what is your supplier number? _____
3. Are you currently registered with PayMode? ___ YES NO
4. Are you a minority owned company? YES ___ NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called PayMode. In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: Erica J. Littleton Date: Jan. 29, 2025

Strategic Planning and Performance Scorecard RFX No. 3120003047

*Proposal submitted by
Martin's Career Coaching & Learning Little People*

February 5, 2025



Contact Person: **Dr. Erica Jewel Littleton**

Learning Little People
Chief Education Officer

PO Box 310994

Birmingham, AL 35231

(205) 643-8534

ericajewel@learninglittlepeople.com

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 Acknowledgment of Amendments

EXECUTIVE SUMMARY

Martin's Career Coaching (MCC), a Mississippi-based business serving clients in both Mississippi and Alabama, in collaboration with Learning Little People, LLC (LLP), an Alabama-based business expanding into Mississippi, is pleased to submit this proposal for the **Strategic Plan & Performance Scorecard** project with the Mississippi Department of Education (MDE). MCC's regional expertise and experience, combined with LLP's strengths in strategic planning and performance management, will deliver a comprehensive, actionable, and measurable strategic plan tailored to MDE's needs..

LLP, with its extensive expertise in strategic planning, data analysis, and educational performance management, will serve as the project lead, overseeing key components such as data collection, SWOT analysis, KPI development, and the creation of a performance scorecard. LLP's focus on evidence-based solutions aligns perfectly with MDE's goals for improving educational outcomes.

MCC brings a deep understanding of Mississippi's educational landscape, gained through years of serving clients in the state. MCC's expertise in stakeholder engagement, professional development, and leadership coaching will ensure alignment between stakeholder input and MDE's strategic priorities. MCC will also provide advisory and oversight throughout the project, ensuring the successful implementation of actionable strategies.

The MCC and LLP collaborative team will work closely with MDE to achieve the following key objectives:

- **Develop a Strategic Plan:** Create a clear, sustainable plan that addresses current and future challenges in Mississippi's education system.
- **Create a Performance Scorecard:** Develop Key Performance Indicators (KPIs) to track progress toward strategic goals and monitor the effectiveness of initiatives.
- **Facilitate Stakeholder Engagement:** Conduct workshops and feedback sessions to ensure the plan reflects the needs of MDE's diverse internal and external stakeholders.
- **Provide Implementation Support:** Deliver ongoing guidance and resources to ensure successful adoption and monitoring of the strategic plan.

By leveraging MCC's local expertise and LLP's strengths in data-driven educational strategies, this collaboration offers a unique, regionally-informed approach to addressing MDE's needs. Together, we are committed to supporting MDE in enhancing educational outcomes statewide through actionable, tailored solutions that meet the unique needs of Mississippi's educators, students, and policymakers.



Brittany Martin, O.D., MBA, MS
Martin's Career Coaching
Founder & Director



Erica Jewel Littleton, Ph.D., NBCT
Learning Little People
Chief Education Officer

PLAN OF ACTION

Production/Detailed Service Plan

This section outlines the Plan of Action to address the scope of services for the Strategic Plan & Performance Scorecard project, as detailed in the RFP. The plan specifies activities and deliverables for MCC and LLP, ensuring alignment with the goals and requirements of MDE. MCC brings experience providing services in both Mississippi and Alabama, while LLP has a proven track record of delivering professional development services in Alabama.

This partnership guarantees the successful achievement of MDE's objectives by combining MCC's expertise in stakeholder engagement with LLP's leadership in strategic planning and performance management. Together, we are committed to providing tailored, data-driven solutions that address MDE's unique challenges and drive long-term success.

All team members bring extensive expertise to the project, each holding advanced degrees in their respective fields. Dr. Brittany Martin, Dr. Erica Jewel Littleton, Dr. Christina J. Ezemenaka, and Mrs. Deonna Haley each hold doctorates or master's degrees, providing a strong academic foundation to support the project's success. This advanced academic training, combined with years of practical experience, ensures that the team is uniquely qualified to lead the Strategic Plan & Performance Scorecard project for the MDE.

Phase 1: Project Initiation and Planning (Months 1-2)

- ***Kick-off Meeting:*** The project will begin with a kick-off meeting involving key stakeholders from the Mississippi State Board of Education. This meeting will ensure alignment of objectives, timelines, and roles for the entire project team.
 - Dr. Erica Jewel Littleton will lead a comprehensive meeting with MDE stakeholders to clarify project objectives, timelines, and roles.
- ***Work Plan Development:*** A detailed work plan will be developed, outlining specific milestones, timelines, and deliverables for the entire project. This plan will serve as a roadmap to guide the team through each phase, ensuring that all tasks are completed on time.
 - Dr. Littleton will oversee the development of a detailed project work plan to outline milestones, timelines, and responsibilities.
 - Mrs. Deonna Haley will manage scheduling and coordination for the team and stakeholders.
- ***Stakeholder Identification:*** Key internal and external stakeholders will be identified and engaged throughout the process, ensuring broad participation in the strategic planning process. The team will prioritize gathering input from educators, policymakers, and community members to ensure broad engagement in the strategic planning process.
 - Dr. Martin and Mrs. Haley will collaborate to map and categorize internal and external stakeholders using tools like stakeholder mapping frameworks to ensure diverse engagement.

Key Deliverables:

- Comprehensive project work plan
- Stakeholder engagement strategy
- Roles and responsibilities defined for the project team

PLAN OF ACTION

Production/Detailed Service Plan (continued)

Phase 2: Environmental Scan, Data Collection, and Strategy Development (Months 1-3)

- ***Review of Existing Documentation:*** The project will include a thorough review of existing strategic plans, performance data, and other relevant documents. This will provide a solid foundation for understanding the current context and inform the development of the strategic plan.
 - Dr. Littleton will lead an in-depth analysis of current strategic plans, performance reports, and policy documents, identifying alignment gaps and opportunities for improvement.
- ***SWOT Analysis:*** A SWOT analysis will be conducted to assess MDE's internal strengths and weaknesses, as well as external opportunities and threats. This will help identify key areas for improvement and growth within MDE.
 - Dr. Christina J. Ezemenaka will conduct the SWOT analysis, leveraging useful frameworks to assess external factors impacting MDE's objectives.
- ***Environmental Scan:*** An environmental scan will be performed to identify relevant educational trends, policies, and technological advancements that could impact MDE's long-term goals.
 - Dr. Ezemenaka will analyze trends, policies, and advancements in Mississippi's educational landscape, ensuring alignment with state and national benchmarks.
 - Dr. Littleton will validate findings against stakeholder priorities.
- ***Data Collection:*** The project team will engage with stakeholders through surveys, focus groups, and interviews to gather valuable input on MDE's current challenges and future opportunities. This feedback will be essential for shaping the strategic plan.
 - Dr. Ezemenaka will oversee the development and analysis of surveys using tools like Google Forms, Qualtrics, or SurveyMonkey, ensuring data accuracy and relevance.
 - Mrs. Haley will manage the logistics of survey distribution and focus group scheduling.
- ***Mission and Vision Review:*** The team will facilitate a review of MDE's mission, vision, and core values, ensuring that they align with the proposed strategic goals. Any necessary revisions will be made to ensure these foundational elements reflect the desired future direction for MDE.
 - Dr. Martin will facilitate discussions with MDE leadership, using tools like vision alignment frameworks to ensure stakeholder consensus.
 - Dr. Littleton will refine mission and vision statements based on input.
- ***Goal Setting:*** Based on the insights gathered in the environmental scan and data collection phases, the team will work to establish long-term strategic goals. These goals will be ambitious but achievable, and they will focus on both short-term needs and long-term aspirations for MDE.
 - Dr. Littleton will lead goal-setting workshops using the SMART goals methodology to ensure goals are specific, measurable, achievable, relevant, and time-bound.
 - Mrs. Haley will draft documentation and consolidate feedback.
- ***Strategy Formulation:*** The team will develop detailed strategies and initiatives to achieve these goals. These strategies will be actionable, measurable, and feasible, ensuring that MDE can make progress toward its strategic objectives.

PLAN OF ACTION

Production/Detailed Service Plan (continued)

- Dr. Littleton and Dr. Martin will collaborate to develop actionable strategies informed by data insights and stakeholder input.

Key Deliverables:

- SWOT analysis report
- Environmental scan report
- Stakeholder engagement summary, including focus group and survey results
- Refined mission and vision statements
- Strategic goals document
- Draft strategic plan

Phase 4: Finalizing the Strategic Plan and Performance Scorecard (Month 4-6)

- **KPI Identification:** KPIs will be identified to measure progress toward the strategic goals. These KPIs will be carefully selected to ensure they are both quantifiable and relevant to MDE's mission.
 - Dr. Ezemenaka will develop KPIs using evidence-based benchmarks and educational metrics to align with MDE's strategic goals.
 - Dr. Littleton will review and validate KPIs for alignment with stakeholder needs.
- **Scorecard Design:** A performance scorecard will be designed to track these KPIs and other relevant metrics. The scorecard will be user-friendly, allowing MDE to easily monitor progress and adjust strategies as needed.
 - Dr. Ezemenaka will design a performance scorecard using a visual representation tool.
 - Dr. Littleton will ensure KPIs align with strategic goals and stakeholder needs.
- **Stakeholder Workshops:** The team will facilitate workshops with board members, educators, and community leaders to gather feedback on the draft strategic plan and performance scorecard. These workshops ensure that the strategic plan reflects the needs and priorities of key stakeholders.
 - Dr. Martin will facilitate workshops to review the draft strategic plan and performance scorecard.
 - Mrs. Haley will manage workshop logistics and document feedback.
- **Feedback Incorporation:** The team will review the feedback collected during the workshops and revise the draft strategic plan and performance scorecard as necessary to address any concerns or suggestions from stakeholders.
 - Dr. Littleton will integrate feedback into the final strategic plan, ensuring stakeholder priorities are addressed.
- **Draft Development:** The team will develop a draft strategic plan that incorporates the strategic goals, key initiatives, and performance scorecard. The plan will outline clear actions, timelines, and responsibilities for achieving MDE's long-term objectives.
 - Dr. Littleton will oversee the preparation of the draft strategic plan, ensuring alignment with MDE's objectives.
 - Dr. Martin will contribute to refining language and presentation.
- **Finalization:** A finalized version of the strategic plan will be prepared, complete with all necessary details to support MDE's strategic vision.

PLAN OF ACTION

Production/Detailed Service Plan (continued)

- Dr. Littleton will finalize the strategic plan, incorporating stakeholder feedback and ensuring readiness for implementation

Key Deliverables:

- KPIs for strategic goals
- Performance scorecard
- Data collection system recommendations
- Workshop agendas, materials, and summaries
- Feedback from workshops and group activities
- Revised strategic plan and performance scorecard
- Final strategic plan
- Final performance scorecard

Phase 5: Final Presentation, Handover, and Training (Month 6)

- *Presentation to the State Board:* The team will prepare and present the final strategic plan and performance scorecard to the State Board of Education. This presentation will highlight the key elements of the plan and the performance metrics for monitoring progress.
 - Dr. Littleton will deliver the final presentation, supported by Dr. Martin, who will highlight stakeholder engagement outcomes.
- *Documentation Handover:* The final strategic plan, performance scorecard, and implementation roadmap will be handed over to MDE in both electronic and print formats.
 - Mrs. Haley will prepare and submit all project documentation in both print and electronic formats.
 - The implementation roadmap will include clear milestones, tasks, responsibilities, resources, and dependencies, as requested in the amendments.
- *Training Session:* The team will conduct a training session to ensure that MDE staff are fully equipped to implement and monitor the strategic plan and performance scorecard.

Key Deliverables:

- Final presentation
- Documentation handover (including final strategic plan, performance scorecard, and implementation roadmap)

Phase 6: Implementation and Monitoring Plan (Month 7-12)

- *Implementation Roadmap:* The team will ensure that the implementation roadmap, handed over in Phase 5, is effectively executed, with detailed steps, timelines, and responsibilities outlined for achieving the strategic goals.
 - Dr. Littleton will oversee the implementation of the roadmap, ensuring all steps are followed.
 - The focus of Phase 6 is on executing the implementation plan, not developing it.
- *Monitoring and Reporting Mechanism:* A monitoring system will be put in place to track progress against KPIs, and a reporting mechanism will ensure that MDE can easily assess performance and make adjustments as needed.

PLAN OF ACTION

Production/Detailed Service Plan (continued)

- *Performance Indicators (KPIs)*: These will include measurable metrics such as student performance improvements, teacher effectiveness, engagement metrics, and operational efficiency.
- *Tracking Progress*: The team will use tools like Tableau and Power BI to visualize real-time data.
 - Dr. Ezemenaka will design monitoring systems to track progress against KPIs, utilizing these tools for data visualization and dashboards.
 - Dr. Littleton will ensure the monitoring system is user-friendly and aligns with MDE's goals.
 - Mrs. Haley will coordinate training sessions to familiarize staff with the tools, ensuring ease of use.
- *Review and Adjustment Protocol*: The team will establish a process for regularly reviewing and adjusting the strategic plan, ensuring that it remains adaptable to changing circumstances and emerging challenges. This review process will include regular check-ins (e.g., quarterly or semi-annual) to assess progress against KPIs and address any issues that may arise.
 - Dr. Littleton will lead the development of a process for regularly reviewing the strategic plan's progress against KPIs.
 - Dr. Martin will assist in facilitating periodic check-ins with stakeholders to gather feedback and recommend necessary adjustments to ensure the plan remains relevant and responsive to changing circumstances.
- *Feedback Mechanisms*: Feedback will be collected from MDE leadership, stakeholders, and community members through structured surveys, focus groups, and meetings. This feedback will inform necessary adjustments to the strategic plan and ensure continued alignment with MDE's evolving goals.
 - The feedback collected during the check-ins will be used to refine the strategic plan and performance scorecard, making adjustments as needed to address new priorities or unforeseen challenges.

Key Deliverables:

- Execution of implementation plan
- Monitoring and reporting mechanisms (including dashboards and real-time data)
- Review and adjustment protocol document (with periodic check-in processes and feedback mechanisms)

PLAN OF ACTION

Project Phases and Deliverables

Phase (Months)	Activity	Key Deliverables
Phase 1: Project Initiation and Planning (Month 1-2)	Kick-off meeting with MDE stakeholders	Detailed project work plan and stakeholder engagement strategy
	Develop detailed work plan with timelines and responsibilities	Roles and responsibilities defined for the project team
Phase 2: Environmental Scan, Data Collection, and Strategy Development (Month 1-3)	Review existing documentation (strategic plans, performance data)	SWOT analysis report
	Conduct interviews, surveys, and focus groups	Environmental scan report
	Analyze collected data and compile results	Stakeholder engagement summary (focus group/survey results)
	Facilitate workshops to refine mission, vision, and strategic goals	Refined mission and vision statements
	Collaborate with MDE leadership to define actionable goals	Defined strategic goals using SMART criteria
	Develop draft strategic plan with initiatives	Draft of strategic plan with detailed strategies and initiatives
Phase 3: Strategy Development & Performance Scorecard Development (Month 3-5)	Identify KPIs for each strategic goal	KPIs identified for strategic goals
	Design and structure the performance scorecard	Performance scorecard design
	Develop data collection systems and reporting tools	Data collection system recommendations
	Gather and integrate feedback from workshops and group activities	Feedback integration from workshops and group activities
	Refine draft of strategic plan and scorecard based on feedback	Revised draft of strategic plan and performance scorecard

PLAN OF ACTION

Project Phases and Deliverables (continued)

Phase (Months)	Activity	Key Deliverables
Phase 4: Finalizing the Strategic Plan and Performance Scorecard (Month 4-6)	Finalize strategic plan with clearly defined actions and timelines	Final strategic plan document with clearly defined actions and timelines
	Ensure final performance scorecard is actionable and aligned with goals	Finalized performance scorecard
Phase 5: Final Presentation, Handover, and Training (Month 6)	Prepare and deliver final presentation to the State Board	Final presentation to the State Board of Education
	Hand over all project documentation and materials to MDE	Handover of final strategic plan, performance scorecard, and implementation plan
	Conduct training session for MDE staff to ensure readiness for implementation	Training materials and session summary
Phase 6: Implementation and Monitoring Plan (Month 7-12)	Implement the detailed implementation roadmap	Execution of implementation plan
	Create monitoring and reporting systems for tracking progress	Monitoring and reporting mechanisms
	Develop review and adjustment protocols for future adjustments	Review and adjustment protocol document

Resumes for Key Personnel

Brittany Martin, O.D., MBA, MS

(601) 927-9382 | Martin.Brittany94@yahoo.com

Dr. Brittany Martin is an accomplished professional specializing in strategic planning, stakeholder engagement, and leadership development. As the **Founder and Director** of Martin's Career Coaching, Dr. Martin has over six years of experience helping individuals and teams achieve professional success through tailored strategies, professional development workshops, and organizational coaching. With a strong background in academic preparation, career coaching, and community engagement, she brings a results-driven approach to improving performance and achieving organizational goals. Dr. Martin's expertise in aligning strategic objectives with actionable plans makes her a valuable leader for educational and organizational initiatives.

Education

- Doctor of Optometry (O.D.)
The University of Alabama at Birmingham School of Optometry, June 2023
- Master of Business Administration (MBA) – General
The University of Alabama at Birmingham, August 2023
- Master of Science (MS) – Biomedical and Health Sciences
The University of Alabama at Birmingham, August 2018
- Bachelor of Science (BS) – Biology
Jackson State University, April 2016

Professional Experience

- Founder/Director – Martin's Career Coaching | December 2017 – Present
 - Develop and lead strategic planning initiatives for clients, focusing on aligning professional goals with actionable outcomes.
 - Design and facilitate professional development workshops on leadership skills, career transitions, and effective communication.
 - Mentor clients in enhancing resume and personal statement writing, preparing for interviews, and building professional confidence.
 - Organize and host community career fairs, connecting individuals with educational and professional opportunities.
 - Provide guidance to high school and college students on the college application process, academic planning, and identifying career pathways.
- Academic and College Preparation Advisor – JumpShot Recruit, LLC | October 2024 – Present
 - Develop and oversee a college preparatory curriculum for middle and high school athletes, ensuring alignment with NCAA academic requirements.
 - Monitor and track students' academic progress, creating tailored strategies for improvement.
 - Educate students and families on the college application process and provide resources for standardized test preparation.

ADMINISTRATION

Resumes for Key Personnel *(continued)*

- Optometrist – The EyeCare Place, Center Point, AL | March 2024 – Present
 - Perform comprehensive and medical eye exams, manage ocular diseases, and educate patients on systemic health connections.
 - Provide leadership in patient care while supporting staff with training on best practices and technical skills.
- Adjunct Instructor – Lawson State Community College | August 2024 – Present
 - Teach and assist with biological science courses and laboratory instruction, focusing on enhancing student comprehension and critical thinking skills.
- Optometrist – National Vision, Inc., Prattville, AL | July 2023 – March 2024
 - Delivered high-quality patient care, including comprehensive eye exams and management of ophthalmic conditions.
 - Educated patients and trained ophthalmic technicians in disease management, therapeutics, and specialty testing procedures.

Research Experience

- Boston University School of Medicine, Boston, MA | June 2015 – August 2015
 - Conducted research on sphingosine-1-phosphate signaling in triple-negative breast cancer.
 - Performed wet laboratory protocols, including western blot analysis, cell therapy, and polymerase chain reaction.

Skills

- Strategic Planning and Visioning
- Stakeholder Engagement and Leadership Coaching
- Curriculum Development and Academic Advising
- Professional and Scientific Writing
- Data Analysis and Interpretation
- Microsoft Office Suite (Excel, PowerPoint, Word) and Microsoft Project

Certifications

- Certified Career Coach
- National Board of Examiners in Optometry Certified in Lasers and Surgical Procedures

Professional Involvement

- Guest Speaker, Marsha Kelley Sutton Scholarship Foundation Virtual Conference
- Guest Vendor, Oak Forest Elementary Career Fair
- Panelist, Emerging OD Panel at VSP Vision SHiFT Conference
- Speaker, New Life Church Career Fair

Resumes for Key Personnel (continued)

Erica Jewel Littleton, Ph.D., NBCT

(205) 643-8534 | EricaJewel@learninglittlepeople.com

Dr. Erica Jewel Littleton is a highly experienced educational leader, strategic planner, and consultant with more than 19 years of experience in urban education, leadership development, and strategic planning. As the **Chief Education Officer** of Learning Little People, Dr. Littleton has led numerous educational reform initiatives, school improvement projects, and performance management systems. She specializes in strategic visioning, data analysis, and leadership capacity building, working with school districts, educational organizations, and non-profit entities to improve student outcomes and organizational effectiveness.

Education

- Doctor of Philosophy (Ph.D.) – Educational Studies in Diverse Populations, Instructional Leadership
University of Alabama at Birmingham, 2017-2023
 - Concentration: Pedagogical Studies
 - Field of Focus: Instructional Leadership in Urban Elementary Schools
- Master of Education (M.Ed.) – Instructional Leadership
Samford University, 2009-2010
- Bachelor of Science (B.S.) – Early Childhood, Elementary, Special Education Collaborative
Samford University, 2001-2005

Certifications

- National Board Teacher Certification – National Board for Professional Teaching Standards (Since 2009)
 - Specialization: Exceptional Needs Specialist, Early Childhood through Young Adulthood (Renewed October 2019)
- Teacher Certifications – Alabama State Department of Education
 - Instructional Leadership Class A, Grades P-12 (Since 2010)
 - Early Childhood Class B, Grades P-3 (Since 2005)
 - Collaborative Teacher Class B, Grades K-6 (Since 2005)
 - Early Childhood Special Education Class B, Grades P-3 (Since 2005)
 - Elementary Class B, Grades K-6 (Since 2005)

Professional Experience

- Owner & CEO – Learning Little People, LLC | April 2013 – Present
 - Lead and design professional development and instructional leadership training programs for educators and educational organizations.
 - Author and facilitate professional learning unit courses approved by the Alabama Council for Leadership Development
 - Provide consulting services to educational institutions and nonprofits.

ADMINISTRATION

Resumes for Key Personnel (continued)

- Director of Educational Advancement – City of Birmingham, Mayor’s Office | June 2019 – July 2021
 - Acted as a liaison between Birmingham City Schools and the City of Birmingham, ensuring alignment on educational goals and policies.
 - Convened partnerships and facilitated connections between potential service providers and the city’s educational initiatives.
 - Served as a clearinghouse for educational resources, providing data analysis and strategic recommendations to improve educational services.
- Turnaround Specialist – Midfield City Board of Education | May 2017 – June 2019
 - Managed the implementation of a \$1.7 million School Improvement Grant for improving academic outcomes in Midfield City Schools.
 - Facilitated bi-weekly leadership team meetings to address academic performance, teacher development, and resource allocation.
 - Provided coaching and support for educators, including leading a National Board cohort for teachers.
- Principal – New Hope Christian School | July 2016 – May 2017
 - Directed all aspects of school operations, including developing and managing instructional programs, setting academic goals, and fostering a positive school culture.
 - Organized fundraising efforts and developed a strategic plan to ensure the school met its financial and educational goals.
 - Assistant Principal – Hayes K-8 School | July 2014 – June 2015
 - Supported Pre-K through 8th-grade teachers, focusing on instructional quality and educational outcomes.
 - Led school accreditation efforts and worked with staff to develop collaborative teams that enhanced overall school performance.

Service and Volunteer Leadership

- State-Level Service
 - Member of the Alabama Department of Early Childhood Education Transition Committee (2020-2021)
 - Board Member of the Alabama National Board Certified Teacher Network (2016-2018)
- Local-Level Service
 - Every Child Alabama Coalition Member (2024-Present)
 - Spring Valley School Board Vice President (2023-Present)
 - EmpowerED Birmingham Board Chair (2023-Present)
 - YouthServe Board Member (2022-Present)
- University-Level Service
 - Samford University School of Education Dean’s Advisory Board Member (2022-Present)
 - Samford University School of Education Dean’s Advisory Board Chair (2022-2024)

Resumes for Key Personnel (continued)

Christina J. Ezemenaka, DrPH, MPH
205-739-9360 | cglenn.math@gmail.com

Dr. Christina J. Ezemenaka is an accomplished data analyst, biostatistician, and public health expert with over 10 years of experience in performance management, data-driven decision-making, and research. She specializes in creating key performance indicators (KPIs), evaluation frameworks, and data models to help organizations track performance and make informed decisions. As a consultant at Learning Little People, Dr. Ezemenaka focuses on statistical analysis and educational consulting, while also contributing to biostatistics research as a Research Assistant at the University of Alabama at Birmingham.

Education

- Doctor of Public Health (DrPH) – Biostatistics
University of Alabama at Birmingham, 2018
- Master of Public Health (MPH) – Epidemiology
University of Alabama at Birmingham, 2014
- Bachelor of Science (BS) – Biology
Alabama State University, 2010

Professional Experience

- Research Assistant – University of Alabama at Birmingham (UAB) | 2015 – Present
 - Conduct statistical analysis and develop biostatistical models for public health and educational research projects.
 - Provide expertise in data collection, analysis, and interpretation, supporting research teams with quantitative and qualitative data for studies focused on health disparities and student achievement.
 - Collaborate with faculty and graduate students to develop research protocols, conduct surveys, and analyze large datasets related to public health and education.
 - Present findings at academic conferences and contribute to the publication of research articles in peer-reviewed journals.
- Senior Biostatistician – University of Alabama at Birmingham | 2015 – 2019
 - Led statistical analysis for various public health studies, focusing on health disparities, community health outcomes, and student health programs.
 - Developed and implemented data management systems for large datasets, ensuring accurate data collection and analysis.
 - Worked closely with cross-disciplinary teams to provide statistical guidance and support, producing data models that contributed to policy changes in educational and public health sectors.
- Public Health Analyst – Alabama Department of Public Health | 2012 – 2015
 - Conducted statistical analysis for public health programs targeting school-aged children and underserved communities, assessing the impact of public health

Resumes for Key Personnel *(continued)*

- initiatives on student health outcomes.
- Developed evaluation frameworks to measure the effectiveness of state and local health programs, ensuring that they met both state and federal standards.
- Provided data-driven recommendations to improve health and education policies.

Skills

- Data Analysis and Modeling
- Key Performance Indicators (KPIs)
- Statistical Software (SAS, SPSS, R)
- Data Visualization (Tableau, Power BI)
- Performance Metrics Development
- Evaluation Framework Design
- Public Health Assessment
- Project Management

Certifications & Training

- Certified Biostatistics Professional
- Certified Public Health Analyst (CPHA)

Resumes for Key Personnel (continued)

Deonna Haley, MS, M.Ed.

601.513.3082 | haleydeonna@gmail.com

Deonna Haley is an experienced educational consultant and project manager specializing in special education coordination, stakeholder engagement, and program implementation. With over 10 years of experience in school leadership and educational programming, she focuses on creating systems that ensure successful project execution and the effective implementation of strategic educational initiatives. As a Special Education Coordinator/Psychometrist with H&H Educational Services, she excels in developing individualized programs and supporting organizational improvement.

Education

- Master of Science (MS) – Curriculum and Instruction
University of Mississippi, 2015
- Master of Education (M.Ed.) – Instructional Leadership
Jackson State University, 2017
- Bachelor of Science (BS) – Elementary Education
University of Alabama, 2010

Professional Experience

- Special Education Coordinator/Psychometrist – H&H Educational Services, LLC
July 2017 – Present
 - Develop and implement individualized education programs (IEPs) for students with diverse learning needs.
 - Conduct psychometric evaluations to assess student abilities and recommend appropriate interventions.
 - Collaborate with teachers, parents, and administrators to create supportive learning environments.
 - Provide professional development and training to educators on special education compliance and best practices.
 - Coordinate school-wide initiatives to improve educational outcomes for students with exceptional needs.
- Director of Curriculum and Instruction – Montgomery Public Schools | 2015 – 2018
 - Oversaw the development and implementation of curriculum for grades K-12, ensuring alignment with state standards and best practices.
 - Provided leadership training and professional development for teachers and administrators to improve instructional practices and overall school performance.
 - Led a team of instructional coaches to improve teaching effectiveness, track progress, and identify professional development needs.
- Elementary School Teacher – Birmingham City Schools | 2010 – 2015
 - Developed and implemented lesson plans for a diverse group of elementary students, focusing on reading, math, and science.
 - Used data-driven assessments to track student progress and made adjustments

ADMINISTRATION

Resumes for Key Personnel *(continued)*

to teaching methods to meet individual student needs.

- Actively participated in school-wide professional development workshops to enhance classroom management skills and instructional techniques.

Skills

- Program Implementation and Management
- Psychometric Assessment and Special Education Coordination
- Curriculum Design and Development
- Teacher Coaching and Development
- Stakeholder Engagement and Collaboration
- Data-Driven Decision Making
- Educational Leadership
- Classroom Management

Certifications

- Certified Instructional Leader
- Certified Psychometrist
- Project Management Professional (PMP)

ADMINISTRATION

References

Client's Name: **EmpowerED Birmingham**

Address: 105 Vulcan Road Ste 344, Birmingham, AL 35209

Contact's Name: **Te'Andria Ellis**

Title: Executive Director

Telephone: (205) 307-9093

Email: t.ellis@empoweredbirmingham.com

Description: LLP is facilitated the *Caregivers Advocacy Program* online for parents and caregivers of students in Birmingham City Schools. Three cohorts have be offered (Spring, Summer, Fall) with each training lasting 8 weeks for 1.5 hours per session. The goal was to engage at least 50 parents and caregivers by November 2024; as of November 25th, we have trained more than 100 parents and caregivers since February 2024.

Duration of Contract: 10 months (Start date: Feb. 2024; End date: Nov. 2024)

Client's Name: **Norwood Elementary School**

Address: 3136 Norwood Blvd, Birmingham, AL 35234

Contact's Name: **Dr. Sakema Porterfield**

Title: Principal

Telephone: (205) 231-3440

Email: sporterfield@bhm.k12.al.us

Description: During the Norwood Elementary School Faculty Retreats of 2022, 2023, and 2024 held at Ross Bridge, LLP delivered comprehensive professional development programs that included mindfulness activities, workshops on restorative practices, character education, mental health strategies, and team-building exercises. These services, provided over two days, aimed to enhance collaboration among Norwood's educators and foster a supportive learning environment, ultimately addressing critical topics relevant to the needs of faculty, staff, and scholars.

Duration of Contract: 2 months for preplanning and coordination plus 2 days of service delivery (Start dates: May 2022, 2023, & 2024; End dates: July 2022, 2023, & 2024)

Client's Name: **Jones Valley Middle School**

Address: 2000 31st St SW #1210, Birmingham, AL 35221

Contact's Name: **Mr. Milton Hopkins**

Title: Former Principal

Telephone: (205) 231-4600

Email: mhopkins@bhm.k12.al.us

Description: LLP coordinated the Jones Valley Middle School Faculty Retreat 2022, at The Wynfrey Hotel. The retreat included a comprehensive agenda featuring various workshops such as Mental Health, Classroom Management, Project-Based Learning, Trauma-Sensitive Approaches & Suicide Protocol, Instructional Expectations & Instructional Framework, Thematic School Design, and Multi-Tiered Systems of Support. Each day began with mindfulness and tone-setting activities, fostering a supportive

ADMINISTRATION

References *(continued)*

environment. The retreat aimed to provide practical, research-based strategies for effective student education, engage faculty in team-building activities, and motivate them for the upcoming school year.

Duration of Contract: 2 months for preplanning and coordination plus 2 days of service delivery (Start date: May 2022; End date: July 2022)

Client's Name: **Family Involvement Program**

Address: 901 9th Avenue North, Birmingham, AL 35204

Contact's Name: **Dr. LaKeshia Douglas**

Title: Family Involvement Program Specialist

Telephone: (205) 231-4600

Email: ldouglas@bhm.k12.al.us

Description: LLP provided workshops in 2022 for parents and caregivers on behalf of BCS that featured 60-minute presentations and discussions held quarterly on one Saturday for each grade band. The services encompassed the creation of workshop presentations, collection of parent registration and attendance information submitted to BCS, and administration of feedback surveys with results also provided to BCS.

Recordings of each virtual training were provided to BCS for future reference.

Duration of Contract: 3 months (Start date: Oct. 2022; End date: Dec. 2022)

PRICE

Cost Data/Budget

Deliverable	Description	Cost
Project Work Plan	A comprehensive plan detailing the project's objectives, scope, activities, timelines, and team responsibilities. This plan will serve as the foundation for project execution.	\$23,100
SWOT Analysis and Environmental Scan Report	A combined report analyzing MDE's internal strengths and weaknesses (SWOT) and external trends, policies, and technological advancements impacting MDE's goals.	\$72,750
Stakeholder Engagement Plan	A plan detailing how key stakeholders (MDE leadership, educators, community leaders) will be engaged throughout the project, ensuring broad input and support.	\$22,890
Draft Strategic Plan and Performance Scorecard	A draft of the strategic plan including mission, vision, goals, KPIs, and the performance scorecard to track the progress toward MDE's objectives.	\$42,760
Final Strategic Plan and Performance Scorecard	The finalized strategic plan with detailed actions, timelines, and responsibilities, and the performance scorecard aligned with MDE's goals.	\$51,233
Final Presentation and Training by October 1, 2025	The final presentation of the strategic plan and performance scorecard to the State Board, including training for MDE staff on how to implement and monitor the plan.	\$20,000
Implementation Roadmap	A detailed roadmap outlining the steps, timelines, and responsibilities required to implement the strategic plan. Ensures that MDE can track progress and meet goals.	\$32,130
Monitoring and Reporting Protocols	A system for tracking progress against KPIs, including data collection methods, reporting structures, and tools to ensure transparency and accountability.	\$93,450
Total Cost		\$358,313

Cost Data/Budget Rationale

The Total Project Cost of \$358,313 encompasses all necessary costs associated with delivering the Strategic Plan & Performance Scorecard project. As requested in Section 2.3 of the RFP, this line-item cost detail for each of the identified deliverables ensures transparency and alignment with the deliverables outlined in the project scope.

This total cost includes all fees for on-site and remote work for both MCC and LLP team members. The fees for personnel, whether working on-site to facilitate workshops and meetings, or remotely for tasks such as data analysis, report writing, and strategic planning, are embedded in the deliverable fees for each phase.

Here is the line-item breakdown for the key deliverables, as per the RFP requirements:

- **Project Work Plan** (\$23,100): This deliverable covers the development of the detailed project work plan, which includes project objectives, scope, activities, timelines, and responsibilities. It serves as the foundation for the entire project, ensuring that all phases are aligned and executed on time.
- **SWOT Analysis and Environmental Scan Report** (\$72,750): This combined report analyzes MDE's internal strengths and weaknesses (SWOT) and evaluates external trends, policies, and technological advancements that impact MDE's long-term goals. This foundational deliverable provides the critical context needed to shape the strategic plan.
- **Stakeholder Engagement Plan** (\$22,890): This plan outlines the approach for engaging key stakeholders (e.g., MDE leadership, educators, and community leaders). It ensures broad and meaningful input throughout the project, helping to refine the strategic plan and align it with MDE's needs.
- **Draft Strategic Plan and Performance Scorecard** (\$42,760): This deliverable includes the first draft of the strategic plan and performance scorecard, which will define MDE's mission, vision, goals, and the KPIs used to measure success. It serves as the initial framework for the final plan.
- **Final Strategic Plan and Performance Scorecard** (\$51,233): This deliverable represents the finalized version of the strategic plan and performance scorecard. It includes clearly defined actions, timelines, responsibilities, and performance indicators aligned with MDE's objectives. This is the key document that will guide MDE's operations moving forward.
- **Final Presentation and Training by October 1, 2025** (\$20,000): This deliverable includes the final presentation of the strategic plan and performance scorecard to MDE's State Board and training for MDE staff to ensure they are equipped to implement and monitor the plan. It ensures that MDE has the necessary skills and knowledge to put the plan into action.
- **Implementation Roadmap** (\$32,130): The implementation roadmap provides a detailed, step-by-step guide for executing the strategic plan, outlining tasks, timelines, and responsibilities. It ensures that MDE can effectively track and manage the execution of the strategic plan.
- **Monitoring and Reporting Protocols** (\$93,450): This deliverable includes the monitoring systems to track progress against KPIs, as well as the reporting mechanisms that will allow MDE to easily assess performance and make necessary

Cost Data/Budget Rationale *(continued)*

adjustments over the course of six months. It provides the tools and processes to ensure the strategic plan is being implemented effectively and aligns with MDE's long-term goals.

The Grand Total (\$358,313) includes all fees for on-site and remote work for MCC and LLP team members, ensuring that all activities are properly accounted for in the cost structure. Travel fees are based on the Mississippi GSA per diem rates, which ensures compliance with state guidelines for all travel-related expenses, including hotel accommodations, car rental, and per diem. Additionally, supplies and personnel costs are incorporated into the deliverable fees, meaning no additional charges for travel, supplies, or contingency will be incurred outside of what is already detailed in the project plan.

This comprehensive breakdown ensures that all aspects of the project are funded adequately, aligning with the deliverables. It guarantees that the project will be executed effectively and efficiently, providing MDE with a clear roadmap for implementation and success.

Appendix C - References

Client Name	<i>See proposal pages 19-20</i>
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Appendix D - REFERENCE SCORE SHEET

Applicant Name:
Reference Name:
Person Contacted, Title/Position:
Date/Time Contacted:
Service From/To Dates:

Able to provide services when you called?	Yes	No
Satisfied with the services provided? If no, please explain.	Yes	No
Applicant easy to work with in scheduling services?	Yes	No
Was the service completed on time and within budget?	Yes	No
Applicant listened when issues were presented to resolve conflict? (If never had an issue, please check here ____.)	Yes	No
Would you hire them again?	Yes	No
Would you recommend them?	Yes	No

Potential applicant must have a minimum of 6 “yes” answers on the questions above from two references (total of 12 “yes” answers) to be considered responsible and to be considered.

Score: Pass/Fail

Do you have any business, professional or personal interest with the applicant? If yes, please explain.	Yes	No
---	-----	----

A “yes” to the above question may result in an automatic disqualification of the provided reference; therefore, resulting in a score of zero as responses to previous questions become null and void.

Notes:

Program Director: _____
Signature
Title
Date

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

____ Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

✓ Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

EGZ 1/29/25

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (✓)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor's current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror's proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

EGZ 1/29/25

Appendix I – COST DATA/BUDGET

The vendor should refer to Section 2.3 Deliverables and provide line-item cost detail for all deliverables identified.

Attach Excel spreadsheet if necessary.

See page 21 of			
Proposal			



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Erica J. Littleton
Authorized Signature

Jan. 29, 2025
Date

Erica J. Littleton
Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Erica J. Littleton

Title: Chief Education Officer

Signature: Erica J. Littleton Date: Jan. 29, 2025



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) “Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.”

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6**: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for [2024](#), effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Erica J. Littleton
Authorized Signature

Jan. 29, 2025
Date

Erica J. Littleton
Printed Name



K12 Coalition

Teaching for the Greater Good

Proposal

Strategic Planning and Performance Scorecard

Presented to Monique Corley, Procurement Director
Mississippi Department of Education

February 5, 2025

Dear Monique Corley,

K12 Coalition, powered by Insight Education Group, Lavinia Group, Teaching Channel, and iTeach is excited to bring our extensive experience in strategic planning to the Mississippi Department of Education, with the goal of developing a comprehensive five-year plan and a performance scorecard that will enhance educational outcomes. Our proven approach to strategic planning will engage a wide range of stakeholders—staff, students, families, community members, and the Board of Education—ensuring that all voices contribute to shaping the future of Mississippi’s public education system.

We will deliver a clear, actionable strategic plan, including well-defined Mission and Vision statements, measurable district goals, and a detailed timeline. This plan will be rooted in thorough research and collective input, providing a roadmap for focused, collaborative progress. In addition, we will create a user-friendly performance scorecard that will feature identified KPIs, support the department in tracking their strategic goals, and ensure effective measurement of embedded strategies.

With over two decades of experience, we’ve successfully led strategic planning initiatives for dozens of state departments of education and school districts nationwide. What sets us apart is our commitment to a partner-driven process, avoiding one-size-fits-all solutions, and ensuring impactful, sustainable results.

Our team includes former teachers, instructional staff, school leaders, and district executives, each with a strong record of success. We understand the complexities and challenges of implementing large-scale initiatives because we’ve walked in your shoes. Key members of our team, including Dr. Andrea Thomas-Reynolds, Aurora Lora, Sierra Leikert, and I look forward to leading this effort.

The attached proposal is based on our understanding of MDE’s needs. We are committed to collaborating with you to fine-tune the scope, services, and timeline to align with your goals and budget.

We look forward to partnering with you to develop the right solutions for MDE’s future.

Respectfully,

A handwritten signature in black ink, appearing to read "Jason Stricker", with a long horizontal flourish extending to the right.

Jason Stricker, President and Co-Founder
Insight Education Group

ORGANIZATION ADDRESS

K12 Coalition
2805 Dodd Rd, Suite 200
Eagan, MN 55121
Phone: (888) 755-9891
Web: <https://k12coalition.com/>

LEADERSHIP TEAM

Jason Stricker, President and Co-Founder - Insight Education Group
Email: Stricker@insighteducationgroup.com

Dr. Andrea Thomas-Reynolds, Co-Managing Director - Insight Education Group
Email: Thomasreynolds@insighteducationgroup.com

Dr. Catina Bullard-Clark, Co-Managing Director - Insight Education Group
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Beth Zhang, Co-President - Lavinia Group
Email: beth@laviniagroup.org

Jackie Taslim, Co-President - Lavinia Group
Email: jackie@laviniagroup.org

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Email: Mike.Smith@k12coalition.com

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COVER PAGE – Proposal Cover Sheet

On the following page, you will find Appendix A: Proposal Cover Sheet. The remainder of the page is intentionally left blank.

Appendix A – Proposal Cover Sheet

Company/Name: Learners Edge, LLC DBA K12 Coalition

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Adam Hall, Chief Financial Officer
Mailing Address	2805 Dodd Road
City, State, Zip	Eagan, MN 55121
Telephone:	(888) 755-9891
E-Mail Address:	adam.hall@k12coalition.com

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? 3102133354
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: Signed by:
Adam Hall
828727C44B58441... _____ Date: 1/29/2025

COMPONENT 1 – PLAN OF ACTION

Tab 1 – Production/Detailed Service Plan

Qualifications

Learners Edge, LLC (DBA K12 Coalition) was founded in 2002 and is a collective of innovative education organizations with a single mission to ensure that all K12 school leaders, teachers, and students have the resources and support they need to thrive and perform at their best. K12 Coalition—including Insight Education Group, Lavinia Group, Teaching Channel, and iTeach—provides support across a wide range of areas such as teacher recruitment and retention, professional development, instructional coaching, leadership development and coaching, and long-range strategic planning. Our core offerings include:

- **School and District Leader Support:** We support schools, districts, charter management organizations, and state education agencies through some of their largest challenges, including successfully turning around chronically under-performing schools, creating equity-focused strategic plans, launching leadership academies, providing executive coaching for school and district leaders, and developing guidance for programmatic development and sustainability of initiatives.
- **iteach:** iteach supports teacher recruitment and staffing efforts by providing an alternative pathway to teacher certification. We have certified over 20,000 teachers and are the only non-university educator preparation program to receive CAEP accreditation. iteach is approved to certify teachers in the state of TN and is currently partnered with 58 districts and charter management organizations.
- **RISE Summer School:** Our RISE Summer School program is a comprehensive summer learning program that provides a dedicated summer curriculum, onboarding, and ongoing professional development to support summer school implementation. In 2024, we supported 7,500 teachers to help over 38,000 students build transferable skills they can carry into the new school year and for years to come. Nationally, partners participating in our 5-week RISE Summer School Program saw a 22 percentage point increase in math achievement scores from pre-test to post-test in 2024. Twenty-nine schools across the state of TN participate in the RISE Summer School program.
- **Professional Learning and Instructional Coaching:** Our professional learning and instructional coaching compels transformative change through our research-based, highly interactive professional learning workshops and job-embedded instructional coaching. We create equitable opportunities for all students by developing instructional leaders and teachers to teach the skills students need to tackle grade-level content with precision and confidence.

- **Teaching Channel:** Our Teaching Channel platform provides school leaders and educators with professional development, continuing education courses and video coaching. We work closely with partners to design custom solutions for their learning and development needs.

K12 Coalition's depth of service offerings allows us to create customized solutions that solve our partners' greatest challenges while creating coherence and synergy across district initiatives.

Our work is driven by more than 480 staff members who have served as teachers, instructional coaches, and school and district leaders (in the past 5 years, we have had an average of approximately 300 employees). In 2023, we supported over 7,000 partners, including 15 state departments of education. Our impact extends to over 1.1M educators nationwide. We work side-by-side with our partners to build internal capacity that achieves excellent results for students.

If awarded, we will provide all services directly related to this contract from offices located in the United States. All project-related work will be performed either from Insight's physical office located in Eagan, Minnesota or remotely from each team member's home, all of which are located in the United States. Further, if awarded, we agree to secure a performance bond for 100% of the awarded annual contract amount, to be submitted within ten (10) days of execution of the contract and prior to commencement of services.

On the following pages, you will find evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi, as well as organization charts showing K12 Coalition's executive leadership and the Insight Education team. The remainder of the page is intentionally left blank.

User Actions

[View Filed Documents](#) [Opt-in or Opt-out of Email updates](#) [Print Business Details](#)

Filed Documents X		
Type	Filed Date	Document
Annual Report LLC	04/03/2024 08:18 PM	View Image
Formation Form	11/21/2023 03:34 PM	View Image

Name History

Name	Name Type
LEARNERS EDGE, LLC	Legal

Business Information

Business Type: Limited Liability Company
Business ID: 1419503
Status: Good Standing
Effective Date: 11/21/2023
State of Incorporation: DE
Principal Office Address: 2805 Dodd Rd, Ste 200
 Eagan, MN 55121

Registered Agent

Name
[Cogency Global Inc.](#)
 248 E CAPITOL STREET, SUITE 840
 JACKSON, MS 39201

Officers & Directors

Name	Title
Adam Hall 2410 Old Ivy Rd Ste 205 Charlottesville, VA 22903	Manager, Other, President
Learners Edge Intermediate LLC 2410 Old Ivy Rd, sTE 205 Charlottesville, VA 22903	Member

F0200
Fee: \$ 250



Michael Watson
SECRETARY OF STATE

2023449300

Business ID: 1419503
Filed: 11/21/2023 03:34 PM
Michael Watson
Secretary of State

P.O. BOX 136
JACKSON, MS 39205-0136
TELEPHONE: (601) 359-1633

Application to Register Foreign Limited Liability Company

Business Information

Business Type: Limited Liability Company
Business Name: LEARNERS EDGE, LLC
Business Email: holland.turnquist@k12coalition.com
State of Incorporation: DE
Date Organized: 09/12/2013

NAICS Code/Nature of Business

611710 - Educational Support Services

Principal Office Address: 2410 Old Ivy Rd Ste 205
Charlottesville, VA 22903

Registered Agent

Name: Cogency Global Inc.
Address: 248 E CAPITOL STREET, SUITE 840
JACKSON, MS 39201

Signature

The undersigned certifies that:

- 1) he/she has notified the above-named registered agent of this appointment;
- 2) he/she has provided the agent an address for the company, and;
- 3) the agent has agreed to serve as registered agent for this company

By entering my name in the space provided, I certify that I am authorized to file this document on behalf of this entity, have examined the document and, to the best of my knowledge and belief, it is true, correct and complete as of this day **11/21/2023**.

Name: Adam Hall
Address: 2410 Old Ivy Rd Ste 205
Charlottesville, VA 22903
President

Delaware

The First State

I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY "LEARNERS EDGE, LLC" IS DULY FORMED UNDER THE LAWS OF THE STATE OF DELAWARE AND IS IN GOOD STANDING AND HAS A LEGAL EXISTENCE SO FAR AS THE RECORDS OF THIS OFFICE SHOW, AS OF THE EIGHTH DAY OF NOVEMBER, A.D. 2023.

AND I DO HEREBY FURTHER CERTIFY THAT THE SAID "LEARNERS EDGE, LLC" WAS FORMED ON THE TWELFTH DAY OF SEPTEMBER, A.D. 2013.

AND I DO HEREBY FURTHER CERTIFY THAT THE ANNUAL TAXES HAVE BEEN PAID TO DATE.



A handwritten signature in black ink, appearing to read "JBULLOCK", is written over a horizontal line. Below the line, the text "Jeffrey W. Bullock, Secretary of State" is printed.

5397759 8300

SR# 20233932450

You may verify this certificate online at corp.delaware.gov/authver.shtml

Authentication: 204553505

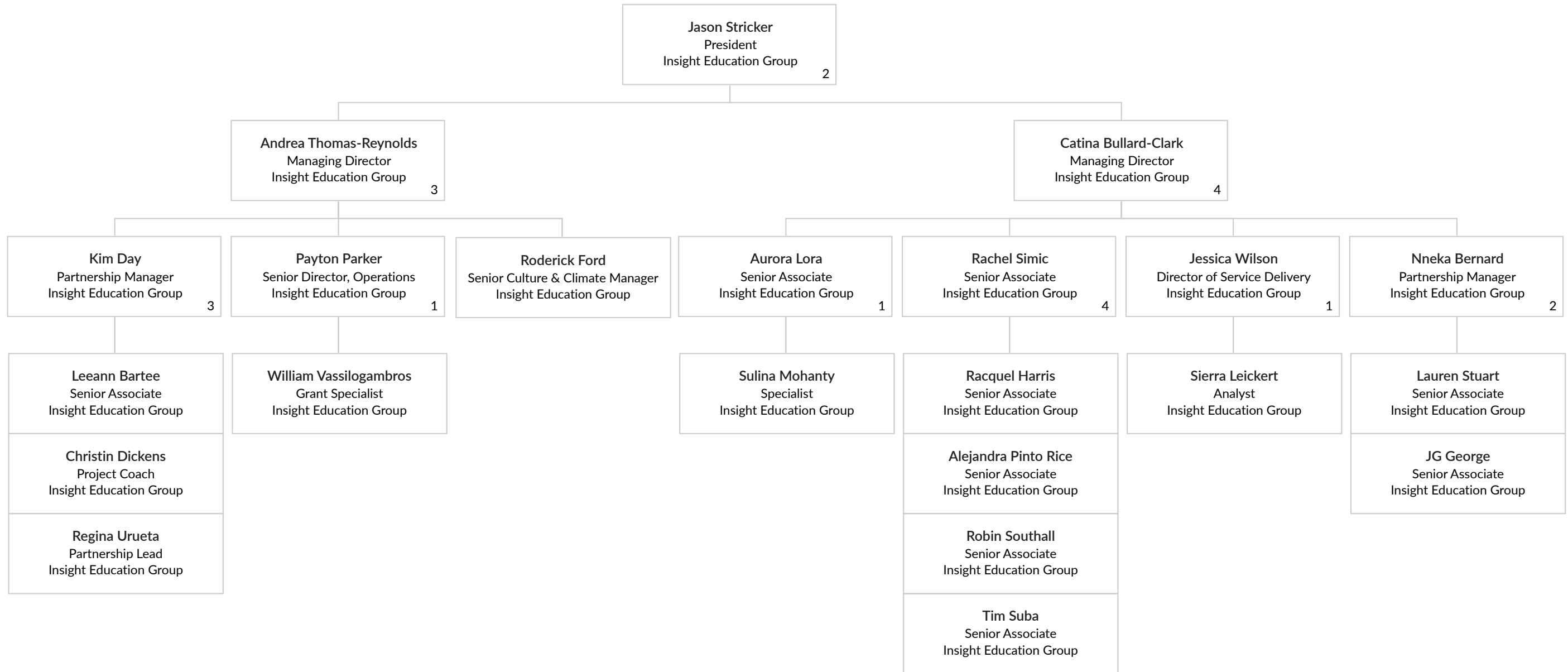
Date: 11-08-23

K12 Coalition Leadership

Jim Hall
CEO
Corporate 10



Insight Education Group Staff



Work Plan

Insight understands the Mississippi Department of Education's need for a strategic partner to develop a comprehensive multi-year plan aimed at improving student outcomes and experiences as well as a performance scorecard to ensure accountability and monitor progress. The strategic plan and performance scorecard will establish clear goals and objectives that are anchored in research-based practices, enriched by extensive stakeholder input, and aligned with the Department's vision and mission.

Having collaborated with state education agencies nationwide, including those similar to the Mississippi Department of Education, we bring a deep understanding of the complexities involved in strategic planning. Our extensive experience equips us to anticipate and address potential challenges, such as aligning diverse stakeholder perspectives, integrating multiple data sources, and ensuring that strategic initiatives are both ambitious and achievable. We leverage these challenges as opportunities to foster innovation, drive consensus, and build a plan that not only meets the partner's current needs but also positions it for sustained success. Our approach is both adaptive and data-driven, ensuring that the plan remains relevant and responsive to evolving organization priorities and external factors. By fostering strong stakeholder engagement and continuously refining our strategies, we maximize the impact of the strategic plan and create a clear path forward for the organization.

Through a rigorous and inclusive planning process (outlined below), we will work with MDE to identify high-impact priorities, align strategic efforts across the organization, and develop a user-friendly performance scorecard to track progress towards MDE's goals. Once the plan and scorecard are finalized, we will collaborate with MDE leadership to develop an implementation strategy, including a monitoring tool and timeline to track progress effectively, and provide ongoing implementation support.

Scope of Work

Insight recognizes the Mississippi Department of Education's commitment to looking forward and adapting to the ever-changing challenges of the public education landscape. Insight will partner with MDE to shape the strategic planning process and develop the Department's next strategic plan along with a performance scorecard, in alignment with that commitment. The plan will encompass the Department's foundational elements, such as core values, vision, mission, and portrait of a graduate, as well as their strategic priorities and goals.

Our approach to strategic planning partnerships includes:

- **Process Design and Development:** We begin by working with partner leadership to design a formalized plan of inquiry and development process. This includes establishing a steering committee representative of the partner's stakeholders. The steering committee plays a crucial role in informing the creation of the new plan and bringing

transparency to the process. The planning process is customized to align with the partner's core beliefs and long-term goals, ensuring a clear and actionable path forward.

- **Data-Driven Analysis:** We conduct a thorough analysis of district data, including quantitative, qualitative, and perception data, to inform the identification of high-impact strategies. This data-driven approach ensures that the strategic plan is grounded in evidence and tailored to the partner's specific context.
- **Stakeholder Engagement and Input:** Meaningful engagement with stakeholders—including students, families, staff, and community members—is central to our process. We design and facilitate listening sessions that capture diverse perspectives, which are then synthesized to identify critical themes and issues.
- **Goal Setting and Alignment:** We work collaboratively with the partner to identify high-leverage goals that address the district's challenges and align with its mission and vision. This alignment ensures that strategic initiatives are both ambitious and achievable, leading to improved student outcomes.
- **Implementation and Monitoring:** We outline a clear process for implementing and evaluating the strategic plan, including the development of a performance scorecard with key performance indicators (KPIs). This system enables partner leadership to track progress and make informed decisions throughout the implementation phase.
- **Project Management and Communication:** Throughout the project, we maintain a strong focus on keeping the process on track, on time, and on budget, while communicating regularly with the partner. We plan for regular engagement with the state superintendent's cabinet and the state board, providing updates and seeking their input at key stages. Additionally, we support the partner in effectively communicating the strategic planning process and the final plan to all stakeholders to ensure transparency and foster shared ownership of the plan's goals.

Throughout this process, Insight will leverage its Strategic Planning Framework, which has been proven to guide partners in setting clear priorities and achieving sustainable success.

Exhibit 1: Insight Education Group’s Strategic Planning Framework



This framework ensures that the strategic plan is actionable, measurable, and aligned with the partner’s long-term goals.

Phase 1: Three Stages of Strategic Planning and Development of Performance Scorecard

In Phase 1, our approach to strategic planning will unfold over three distinct stages, each designed to build upon the previous one, ensuring a thorough and cohesive development process. This three-stage approach will allow us to systematically address MDE’s needs while adapting to emerging insights and challenges.

Given our strong belief that an organization’s strategic plan must authentically reflect its community, stakeholder engagement is a key part of each stage of our process. Through surveys and focus groups, we actively involve a diverse range of voices, ensuring that the perspectives and needs of students, parents, educators, and community members are woven into the fabric of the plan. Our goal is to amplify these voices, ensuring that the strategic plan is not only informed by data and district leadership, but also deeply rooted in the experiences and aspirations of all of MDE’s stakeholders.

INSIGHT'S THREE STAGES OF STRATEGIC PLANNING



Stage 1: Pre-Work

During the Pre-Work Stage, our primary focus is on establishing a strong foundation for the strategic planning process. We will achieve this through close collaboration with the Mississippi Department of Education on the creation of a clear work plan and the formation of a representative steering committee, as well as conducting a comprehensive needs assessment and research related to the Department's needs and context.

We will begin by collaborating with MDE leadership during a kickoff call to form a steering committee that reflects the diversity of the Department's stakeholders. This committee will play a pivotal role in guiding the strategic planning process, ensuring that the voices of students, parents, teachers, school leaders, community members, and other key stakeholders are heard and considered throughout the development of the plan. The steering committee also serves as a critical link to the broader community, sharing progress and gathering feedback to keep the process transparent and inclusive.

During this phase, we will also identify key stakeholders and conduct a comprehensive needs assessment, including a SWOT analysis and environmental scan. This involves gathering and analyzing quantitative information, such as student performance metrics, school effectiveness data, and MDE policies, as well as qualitative stakeholder input around their perceptions of and hopes for the Department. By examining both the quantitative data and the qualitative feedback, we will gain a deeper understanding of MDE's strengths, challenges, and opportunities. We will then synthesize these findings, distilling key themes and critical issues that will inform the strategic planning process moving forward.

The Pre-Work Stage will provide us with a clear, data-informed understanding of MDE's current landscape and the foundational elements needed to develop a strategic plan that is both ambitious and achievable.

Stage 2: Design

During the Design Stage, our primary focus is on drafting the strategic plan and performance scorecard. We will first work on articulating the foundational elements such as the mission, vision, and values that will guide the Department's future. From there, we will guide MDE to establish clear priorities, goals, and objectives that directly address their needs and challenges. These will help determine the KPIs used in the performance scorecard.

As we draft the strategic plan and develop a performance scorecard, we will facilitate regular reporting between state-level departments and the larger strategic planning committee. This accelerates the development of district-level operating plans that are aligned with the state-level strategic plan and uncovers interdependencies across districts. These interactions also deepen each individual's understanding of the plan, enabling steering committee members to see their role in its execution and to act as "ambassadors" of the plan within their respective areas while ensuring that every district understands how their work contributes to MDE's broader goals.

Once content is drafted, we will solicit stakeholder feedback through targeted engagement, such as focus groups, then revise and finalize the strategic plan and performance scorecard. This ensures that the plan is not only comprehensive but also reflective of the community's needs and aspirations, while fostering a shared sense of ownership among those who will implement it.

The Design Stage will shape the strategic plan and performance scorecard into cohesive and actionable documents, ensuring that they are aligned with MDE's mission and responsive to stakeholder input, establishing a plan for the Department that is both visionary and grounded in its current needs.

Stage 3: Implementation

In the Implementation Stage, the strategic plan moves from vision to action. We will begin by supporting MDE in publishing and broadly communicating it, ensuring that all stakeholders are informed and understand the plan's significance. This support will include graphic design of the plan, presenting the plan to the state board, staff, students, families, and wider community, and other actions to make the plan accessible and transparent.

After the plan and performance scorecard are finalized and approved, Insight will collaborate with MDE's administrative team to ensure its successful execution. We will focus on defining

specific initiatives and identifying the action steps needed to achieve the strategic goals. A key component of this step is the alignment of district-level goals with the state-wide strategic plan, ensuring coherence across all levels of the organization. We provide a template through which districts can align their work to the plan's goals and break initiatives down into manageable tasks with clear timelines, responsibilities, and resources allocated to ensure successful execution and easy monitoring. In addition, we will provide a 2-hour training for each goal area lead in June or July to provide an overview of the implementation process and tools. During this training, we will work with the leads to develop district plans for their performance objectives and to identify the milestones they will accomplish each quarter in order to achieve their yearly SMART goals for the performance objectives.

Finally, internal and external reporting mechanisms are established. Insight will guide MDE through a series of critical questions to ensure that the reporting process is effective and meaningful. These questions address the Department's reporting capabilities, the desired frequency of updates, and the identification of key audiences. Having a clear reporting process ensures that implementation of the plan remains on track and that stakeholders are provided ongoing updates, ensuring transparency and accountability.

The Implementation Stage is where the strategic plan and performance scorecard will transform into dynamic, living documents that drive action, foster accountability, and deliver measurable results across the state.

Phase 2: Ongoing Implementation Support

In Phase 2, Insight will support the implementation of the strategic plan and work with the MDE administrative team to identify and outline specific ways to meet and measure the goals and performance objectives identified in the performance scorecard. To do this, we will create an implementation roadmap and a performance management process to allow the leadership and stakeholders to refine the strategic plan and focus on positive student outcomes. We will also work with MDE to create a sustainable plan for alignment of district goals to the strategic plan. This will include the creation of monitoring and reporting protocols and structure regarding board updates, a timeline and roles and responsibilities for aligning district-level plans, and support for developing the strategic plan updates for the board and community.

As part of the implementation plan, Insight will provide:

- Facilitation of quarterly work group sessions for each goal area team to discuss progress, troubleshoot challenges/roadblocks encountered, make adjustments to action steps and timelines, and prepare for the quarterly board updates. These meetings will tentatively be scheduled for April 2025, July 2025, October 2025, and January 2026.
- Develop presentation/slide deck with MDE for board updates and town hall meetings.

Performance Scorecard Utilization

In Phase 2, Insight will collaborate with MDE to utilize its customized performance scorecard that highlights the Department's strategic plan goals and tracks progress toward achieving them. We will work closely with Department leadership to determine the appropriate level of detail to best serve MDE's needs, ensuring that the scorecard is both regularly updated and easily accessible. By implementing a process like this, the Department can enhance its strategic focus, become more goal-driven, and foster a data-centric approach to decision-making. Making such a scorecard public-facing increases transparency and accountability, as well as strengthens the collaborative relationship between the Department and its community.

Examples of performance tracking tools we have developed for other strategic planning partners are included below.

Exhibit 1. Progress Monitoring Spreadsheet

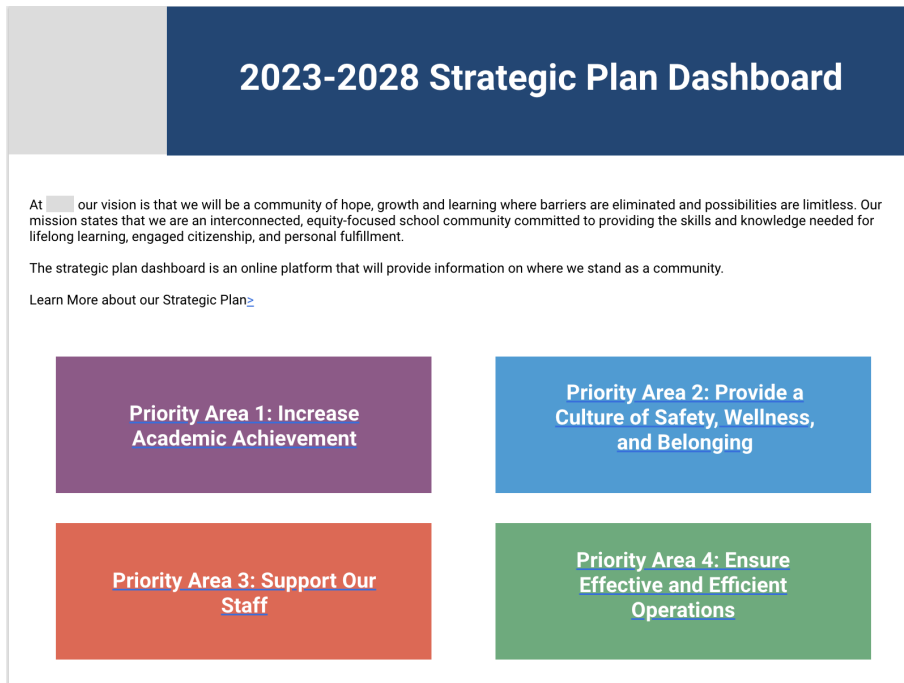
2022-2027 - Strategic Plan - Goal Progression Dashboard											
Academics K-6		Academics (7-12) & Postsecondary Success		Well-Being		People and Culture/Human Capital		Financial and Operational Stewardship		Community Engagement and Communications	
Goal Status	Goal Status	Goal Status	Goal Status	Goal Status	Goal Status	Goal Status	Goal Status	Goal Status	Goal Status	Goal Status	Goal Status
Goal 1: All --- students will meet or exceed the state standard or demonstrate significant measurable improvement	"Not Met"	Goal 7: --- students will achieve on track performance on multiple measures of success by meeting or exceeding the state standard and/or demonstrating measurable growth	"Met"	Goal 11: --- will provide wrap around supports (e.g. counseling services, academic interventions, behavioral supports) to enhance the career, academic, and social/emotional development of all students	"Not Met"	Goal 13: All staff and district leadership will participate in scheduled, ongoing, job-embedded, and content-appropriate professional learning focused on evidence-based instructional practices, staff growth goals, and student performance goals outlined in	"Met"	Goal 17: All students will experience enhanced safety, security, wellness and learning through the completion of facilities, security and technological improvements enabled by financial stability.	"In Progress"	Goal 19: Demonstrate an integrated communications plan aligned to the --- Strategic Plan and MSIP 6. Build communication efforts to achieve desired behaviors and outcomes.	"In Progress"
Goal 2: --- will ensure birth through prekindergarten children have access to high-quality early learning experiences	"Met"	Goal 8: The school system is intentional in providing relevant, high-quality career technical education and/or advanced professional studies based on students' ICAPS	"Not Met"	Goal 12: --- will provide a safe and caring environment that supports teaching, learning, and student success.	"In Progress"	Goal 14: All employees will demonstrate growth while participating in an effective evaluation process based upon clear, written, and measurable targets that are aligned with the vision, mission, and goals of the district.	"In Progress"	Goal 18: --- will be fiscally responsible by maintaining an appropriate annual fund balance.	"Not Met"	Goal 20: Strengthen community involvement with all stakeholders (e.g. parents, businesses, staff, students, local non-profits and government) through collaborative partnerships focused on the goals of the strategic plan.	"Met"
Goal 3: All --- schools will provide a comprehensive multi-tiered system of support that addresses the academic, emotional, behavioral, social, and physical needs of each student.	"In Progress"	Goal 9: All --- staff will implement evidence-based instructional practices to ensure the success of each student.	"In Progress"			Goal 15: --- will ensure a healthy climate and culture for all staff and students by regularly assessing stakeholder perceptions and making appropriate adjustments.	"Not Met"				
Goal 4: All --- students will develop essential intrapersonal and interpersonal skills.	"Not Met"	Goal 10: Students will graduate prepared for global success	"Met"			Goal 16: The district will recruit, develop and retain a high-quality, diverse staff that is representative of the student body.	"Off-Track"				
Goal 5: All --- schools will implement board-adopted teacher/leader standards to ensure effective instructional staff for each student.	"Off-Track"										
Goal 6: All --- staff will implement evidence-based instructional practices to ensure the success of each student.	"Met"										

Academics (K-6)

Priority	Goals	Progress	Indicators	Milestones
Academics (K-6)	Goal 1: All --- students will meet or exceed the state standard or demonstrate significant measurable improvement (TL1)		A. Students demonstrate readiness for school entry in alignment with the Missouri Early Learning Standards	"Not Started" -
			B. Beginning in elementary school, students demonstrate regular attendance	"Not Started" -
			C. In elementary school, students demonstrate on-track performance through benchmark assessment of literacy and numeracy	"Not Started" -
	Goal 2: --- will ensure birth through prekindergarten has access to high-quality early learning experiences (TL2)		A. Informs family and community about the importance of early learning experiences	"Not Started" -
			B. Provides Parents as Teachers program for early learning experiences	"Not Started" -
			C. Identifies well-rounded, developmentally appropriate preschool opportunities available to children	"Not Started" -
			D. Measure the effectiveness of early learning experiences	"Not Started" -
	Goal 3: All --- schools provide a comprehensive multi-tiered system of support that addresses the academic, emotional, behavioral, social, and physical needs of each student. (TL7) Note: this goal applies to three priorities including Academics K-6, Academics 7-12, and Well-Being.		A. The --- establishes learning and behavioral supports that are identified, coordinated, and implemented with fidelity at the classroom, building, and system level.	"Not Started" -
			B. The --- monitors the implementation of these supports through observation, program evaluation, and data analysis.	"Not Started" -
			C. The --- implements a written process for the early identification of students' needs and implements differentiated learning and behavioral supports for each student.	"Not Started" -
			D. The --- uses targeted student assessment and data collection to monitor, evaluate, and inform decision-making to identify and implement successful learning and behavioral supports.	"Not Started" -
	Goal 4: All --- students will develop essential intrapersonal and interpersonal skills. (TL4)		A. Ensures opportunities for students to develop initiative and engage in collaborative problem solving	"Not Started" -
			B. Ensures opportunities for students to be part of one or more co-curricular, extracurricular, or leadership opportunities and CTSOs.	"Not Started" -
	Goal 5: All --- schools implement board-adopted teacher/leader standards to ensure effective instructional staff for each student (TL5)		A. Provides leadership development opportunities for all educators	"Not Started" -
	Goal 6: All --- staff implement evidence-based instructional practices to ensure the success of each student. (TL6)		A. Students receive literacy and numeracy instruction	"Not Started" -
			B. Building leaders monitor and provide feedback on the use	"Not Started" -
			C. Instructional staff design and use appropriate, meaningful,	"Not Started" -

Exhibit 2. Performance Scorecard Platform

Landing Page:



2023-2028 Strategic Plan Dashboard

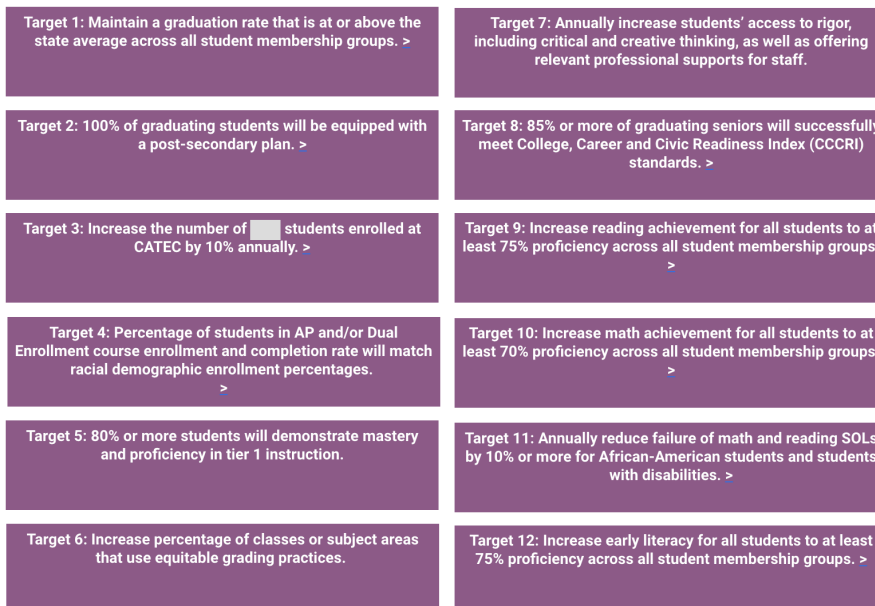
At [redacted] our vision is that we will be a community of hope, growth and learning where barriers are eliminated and possibilities are limitless. Our mission states that we are an interconnected, equity-focused school community committed to providing the skills and knowledge needed for lifelong learning, engaged citizenship, and personal fulfillment.

The strategic plan dashboard is an online platform that will provide information on where we stand as a community.

[Learn More about our Strategic Plan](#)

- Priority Area 1: Increase Academic Achievement**
- Priority Area 2: Provide a Culture of Safety, Wellness, and Belonging**
- Priority Area 3: Support Our Staff**
- Priority Area 4: Ensure Effective and Efficient Operations**

Sample Priority Page:



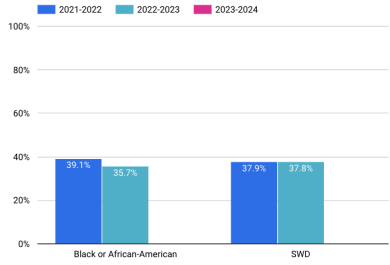
- Target 1:** Maintain a graduation rate that is at or above the state average across all student membership groups. >
- Target 2:** 100% of graduating students will be equipped with a post-secondary plan. >
- Target 3:** Increase the number of [redacted] students enrolled at CATEC by 10% annually. >
- Target 4:** Percentage of students in AP and/or Dual Enrollment course enrollment and completion rate will match racial demographic enrollment percentages. >
- Target 5:** 80% or more students will demonstrate mastery and proficiency in tier 1 instruction.
- Target 6:** Increase percentage of classes or subject areas that use equitable grading practices.
- Target 7:** Annually increase students' access to rigor, including critical and creative thinking, as well as offering relevant professional supports for staff.
- Target 8:** 85% or more of graduating seniors will successfully meet College, Career and Civic Readiness Index (CCCR!) standards. >
- Target 9:** Increase reading achievement for all students to at least 75% proficiency across all student membership groups. >
- Target 10:** Increase math achievement for all students to at least 70% proficiency across all student membership groups. >
- Target 11:** Annually reduce failure of math and reading SOLs by 10% or more for African-American students and students with disabilities. >
- Target 12:** Increase early literacy for all students to at least 75% proficiency across all student membership groups. >

[Return to Strategic Plan Dashboard Overview](#)

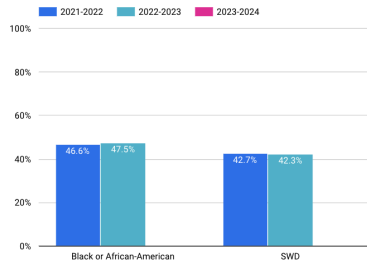
Sample Data Pages:

Increase Academic Achievement
 Target Description: Annually reduce failure of math and reading SOLs by 10% or more for African-American students and students with disabilities

MAP Growth Math by Student Group



MAP Growth Reading by Student Group

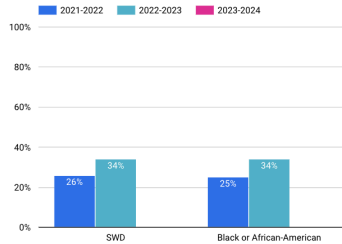


[Return to Priority 1 Targets](#)

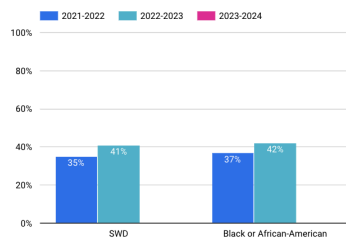
[Return to Strategic Plan Dashboard Overview](#)

Increase Academic Achievement
 Target Description: Annually reduce failure of math and reading SOLs by 10% or more for African-American students and students with disabilities

SOL Pass Rate by Student Group (Math)



SOL Pass Rate by Student Group (Reading)



[Return to Priority 1 Targets](#)

[Return to Strategic Plan Dashboard Overview](#)

Timeline

Please see the proposed timelines below for Phase 1 and Phase 2. Note that the timelines represent Insight's recommendations based on the RFP and may be adapted following a kickoff meeting with MDE.

Phase 1: Three Stages of Strategic Planning and Development of Performance Scorecard

Task/Deliverable	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Stage One: Pre-work						
Project Initiation and Planning: <ul style="list-style-type: none"> • Kickoff Meeting • Project Work Plan • Stakeholder Identification 						
Environmental Scan and Data Collection: <ul style="list-style-type: none"> • Review of Existing Documentation • SWOT Analysis • Environmental Scan • Stakeholder Surveys/Interviews 						
Stage Two: Design						
Strategy Development: <ul style="list-style-type: none"> • Mission and Vision Review • Goal Setting • Strategy Formulation 						
Performance Scorecard Development: <ul style="list-style-type: none"> • KPI Identification • Scorecard Design • Data Collection Mechanisms 						
Drafting and Finalizing the Strategic Plan: <ul style="list-style-type: none"> • Draft Strategic Plan • Review and Revision • Final Strategic Plan 						
Stage Three: Implementation						

Task/Deliverable	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Final Presentation and Handover: <ul style="list-style-type: none"> • Presentation to the Board • Documentation Handover • Training Session 						

Phase 2: Ongoing Implementation Support

Task/Deliverable	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Implementation and Monitoring Plan: <ul style="list-style-type: none"> • Implementation Roadmap • Monitoring and Reporting Mechanism • Review and Adjustment Protocol 						

COMPONENT 2 – ADMINISTRATION

Tab 2 – Resumes for Key Personnel

Insight's unique structure allows us to assign to this project a specialized team equipped with the experience and expertise needed to ensure high quality, flexible support at all times. Specific roles and responsibilities of each proposed project team member are reflected below:

Executive Sponsors include Insight's principals and executive team members, who ensure contract fulfillment, oversee all elements of service delivery and communicate regularly with project staff and partners to guarantee optimal results. Executive Sponsors have extensive backgrounds in education, as well as specific experience managing large contracts in this capacity.

For this project, Jason Stricker and Dr. Andrea Thomas-Reynolds will serve as the executive sponsors.

Jason Stricker is a co-founder of Insight Education Group. With extensive experience in education as a teacher, instructional and executive coach, chief academic officer for Alliance College-Ready Public Schools, consultant, and business leader, Jason brings to his work a deep understanding of educator effectiveness and organizational change and its impact on stakeholders at all levels, including serving as chief architect of instructional frameworks and aligned calibration training in several districts. He has authored articles in education's top publications and is the co-author of *Strategic Design for Student Achievement* (2009) and *Coaching for Change* (2008). Jason is based out of Connecticut.

Dr. Andrea Thomas-Reynolds serves as Managing Director of Insight Education Group. She has over 20 years of experience working with charter schools and small-to-medium sized districts in operations and organizational management, strategic planning, transitional leadership and executive coaching services. As a former district network leader in New Orleans, Louisiana, she brings expertise of connecting schools to function as a networked group to share and incorporate best instructional practices and transparency across the network of schools. In her role at Insight, she provides strategic direction to achieve organizational goals and manages the business development and grant operations team, including the implementation of two federal grant awards with the Teacher School Leader Grant. Andrea holds a bachelor's degree in accounting from Louisiana State University, a master's degree in business administration from Loyola University of New Orleans, a master's degree in community economic development from Southern New Hampshire University, and an Ed.D. from the Mid-Career Doctorate Program at the University of Pennsylvania in educational leadership and organizational management.

Senior Associates work directly with partners to plan and deliver high-quality, engaging professional learning experiences. They are assigned to work based on their backgrounds in education, ensuring all services are led by team members with experience and success in

similar work. We recruit only seasoned former teachers and administrators and ensure they are equipped with the resources to effectively promote the growth of educators.

For this project, Aurora Lora will serve as the senior associate.

Aurora Lora serves as a Senior Associate at Insight Education Group. At Insight, she leads district strategic planning, conducts district equity audits, and develops and delivers professional development and coaching for leaders nationally. Prior to joining Insight, Aurora served as the Chief of Schools for Uplift Education, a high-performing charter school network with 43 schools across the Dallas-Fort Worth metroplex. She also served as the superintendent for Oklahoma City Public Schools where she was responsible for leading and overseeing 46,000 students and 5,000 staff members, so she has vast experience working with large school districts to generate real change. Prior to becoming a superintendent, Aurora served as an Assistant Superintendent for the Dallas Independent School District, Executive Director of PK-12 Schools for Seattle Public Schools, a middle/high school principal in Portland Public Schools, and an elementary school teacher in the Houston Independent School District. She has also designed and delivered professional development and coaching for assistant principals, principals, and principal supervisors in a number of urban districts, such as Seattle Public Schools, Dallas Independent School District, and Oklahoma City Public Schools. Aurora holds a bachelor's degree from the University of Texas at Austin and a master's degree in education policy and management from Harvard University.

Analysts provide a variety of support to project teams, including project management, data analysis and research, and presentation preparation. Analysts have experience in project management and research.

For this project, Sierra Leickert will serve as the analyst.

Sierra Leickert serves as an Analyst at Insight Education Group. Sierra integrates collected qualitative and quantitative data to generate project findings that communicate actionable insights to district partners in a final equity audit report. Sierra supports members of the Service Delivery team to conduct research and data analysis and to produce client-facing documents, resources, and tools.

Sierra attended the University of Virginia and graduated with a Bachelor of Arts in Education and a Master of Public Policy degree. She began her career in education as a middle school science teacher in a Title 1 charter school in New Orleans, Louisiana. This is where she saw a great need for STEM education amongst historically marginalized populations. She has also served as a lead middle school math teacher in Washington, DC. As a math lead, Sierra supported differentiation of materials and implementation of hands-on learning opportunities. Her most recent experience was assisting students throughout the Washington, DC metro area in their college-going journey. Sierra believes that every child should have access to a high-quality education that meets both their academic and social-emotional needs.

The pages that follow contain resumes of all Insight staff that are designated to deliver services outlined within this proposal. The remainder of the page is intentionally left blank.

Jason Stricker

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Phone: 800.935.7022
E-Mail: stricker@insighteducationgroup.com



EDUCATION/CERTIFICATION

Belmont University. Nashville, TN
Master of Arts, Education

University of California. Davis, CA
Bachelor of Arts, Political Science

EXPERIENCE

Insight Education Group, LLC. Eagan, MN 2002-Present
Founding Partner

Co-founded Insight Education Group, an international educational consulting company that works with education leaders to develop the strategy and confidence to lead bold change and provides the embedded supports necessary for change to occur. Designed, led, and managed national and international projects related to strategic planning, teacher/principal/superintendent evaluation; observer calibration and inter-rater reliability training and certification; curriculum development; instructional effectiveness; instructional coaching for educators; and assessment for PK-12 public schools.

CEO 2015-2018

- Create and nurture partnerships with schools, districts, states, and other organizations and advise the direction and execution of services, including school improvement, leadership development, and teacher growth
- Serve as thought partner to district and organizational leaders to help drive organizational change
- Set the vision and direction of the company, including driving company culture
- Seek out and nurture relationships with other companies and organizations to promote partnership opportunities
- Raise the profile and positions of Insight through public speaking engagements, editorials, and presentations

Areas of expertise: strategic planning; building, leading, and managing educator effectiveness initiatives for teachers, principals, and superintendents; organizational change; facilitating large-scale professional development trainings for educators; executive coaching for principals and district leadership

Highlighted larger-scale client projects:

- School District of Philadelphia (Philadelphia, PA): Facilitating the development of the 2023-2028 strategic plan and working with the Superintendent and Cabinet to ensure effective implementation.
- Guilford County Schools (Greensboro, NC): Develop and facilitate annual cabinet retreats with focus on progress monitoring of strategic initiatives and organizational leadership development; developed and implemented principal supervisor professional development focused on common approach to analyzing data across the system; developed aspiring leaders academy for leaders of color
- Clark County School District (Las Vegas, NV): Develop and facilitate a comprehensive leadership pipeline professional development program for school based and central office leaders
- Queen Rania's Teacher Academy (QRTA) (Amman, Jordan): In partnership with the University of Connecticut, developed and facilitated a comprehensive principal leadership academy for 3,000

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principals in the Kingdom of Jordan. Built capacity of QRTA staff to sustain the program and provide ongoing coaching and support to principals

- Alliance College-Ready Public Schools, (Los Angeles, CA): Served as the interim Chief Academic Officer to drive improvements in curriculum & instruction, professional development, data-driven instructional leadership, and Alliance-wide leadership and team management
 - *Curriculum & Instruction*: Supported Alliance's continued transition to the Common Core State Standards and Next Generation Science Standards by guiding the development of aligned curriculum and the selection of appropriate instructional resources; directly managed and built the capacity of a team of Content Directors
 - *Professional Development*: Developed, implemented and led professional learning curricula, and design; developed ongoing training and support programs for school leaders to build capacity in instructional leadership and management skills
 - *Data-Driven Instructional Leadership*: Built the capacity of other staff in the Instructional division and in Alliance schools to assess, understand, and use student achievement data to inform decisions and strategies
 - *Alliance-wide Leadership and Team Management*: Provided leadership and support of Alliance's strategic goals as a member of the Alliance Leadership Team, with a strong focus on the instructional vision of the organization, manage, coach, and support the home office instructional team to develop a pipeline of future Alliance leaders
- Syracuse City School District (NY): Provide strategic direction and advisement to Superintendent and Chief Academic Officer in setting strategic plan for instructional improvement across the district; facilitate cross-functional design meetings to develop operating plans by department to ensure work of each department is aligned to strategic plan; facilitate the design of the district's leadership academy to build the capacity of school building leaders

President

2002-2015

- Create and nurture partnerships with schools, districts, states, and other organizations and advise the direction and execution of services
- Seek and secure new business opportunities, working with prospective clients to design services that best meet their needs
- Oversee program implementation by providing strategic vision, direction for service delivery team and fiscal oversight to projects

Examples of client partnerships include:

- Baltimore City Public Schools (MD): Provided strategic direction, management support, and direct services to district and school leaders related to teacher evaluation; observer calibration and certification.
- Chicago Public Schools (IL): Served as lead architect of Teaching for Learning Framework and rubric, accompanying implementation plan and professional development for school leadership teams.
- District of Columbia Public Schools (DC): Designed and implemented a Quality School Review process to evaluate underperforming schools. Facilitated the development of school restructuring plans using data gathered from Quality School Reviews.
- TNTP (formerly The New Teacher Project) (NY): Designer/writer of national teacher certification and training program and complementary professional development series.
- California Department of Education: Approved as a School Assistance and Intervention Team leader by the CDE. Conducted school evaluations of underperforming schools throughout the state and developed recommended actions for improvement.

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- The Broad Foundation (CA): Developed and facilitated professional development series for Broad Residents on connecting school, leader, and teacher effectiveness.
- UCLA School Management Program (CA): Designed and presented professional development seminars and provided follow-up, classroom coaching for K-12 teachers in order to improve teacher practice and enhance student achievement.

Fresno County Office of Education. Fresno, CA
Literacy Consultant

2001-2002

- Developed and presented literacy and curriculum design workshops for K-12 teachers in 34 school districts.

Metro Nashville Public Schools. Nashville, TN
Gower Elementary
Teacher

1998-2001

- Provided targeted assistance to children in grades 1 and 2 who experienced difficulty attaining early literacy skills.
- Used best practices such as Reading Recovery principles and Guided Reading.

SELECT PRESENTATIONS

- Stricker, Jason and Culbertson, Jason. "Instructional Leadership: The Key Levers That Drive Change." Workshop, Edupedia Educator and School Leader Workshop, Cairo, Egypt, 2017.
- Stricker, Jason and Culbertson, Jason. "Levers to Increasing the Effectiveness of School Leadership." Presentation series, The Cairo School Leadership Symposium, Cairo, Egypt, 2017.
- Stricker, Jason. "Supporting Teacher Effectiveness Project (STEP)." Presentation, EduForum International Education Conference, Cairo, Egypt, 2016.
- Stricker, Jason. "Strategic Design for Student Achievement Presentation." Presentation, EduForum International Education Conference, Cairo, Egypt, 2016.
- Moody, Michael, Stricker, Jason, Nyankori, Richard. "Meeting the Challenge of College and Career: Supporting and Accelerating Educator Growth." District Administration Leadership Institute Summit, New Orleans, LA, October 2015.
<https://www.daleadershipinstitute.com/content/meeting-challenge-college-and-career-supporting-and-accelerating-educator-growth-0>.

SELECT PUBLICATIONS

- Stricker, Jason and Culbertson, Jason. "How to Build a Successful Instructional Coaching Program." *Insight Blog*, June 15, 2017.
<http://www.insighteducationgroup.com/blog/how-to-build-a-successful-instructional-coaching-program>
- Stricker, Jason, and Culbertson, Jason. "How Does Wrap-Around Leadership Inspire Lifelong Learning in Principals?" *Getting Smart*, June 6, 2017.
<http://www.gettingsmart.com/2017/06/how-does-wrap-around-leadership-inspire-lifelong-learning-in-principals/#>

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- Stricker, Jason. "Distributive Leadership: 5 Ways Principal Coaches Can Help Principals Execute." *Insight Blog*, April 12, 2017.
<http://www.insighteducationgroup.com/blog/distributive-leadership-5-ways-principal-coaches-can-help-principals-execute>
- Stricker, Jason, and Cantrell, Steve. "How the STEP Model Uncovers Local Bright Spots and Transforms Instruction ." *Education Week*, March 1, 2017.
http://blogs.edweek.org/edweek/education_futures/2017/03/how_the_step_model_uncovers_local_bright_spots_and_transforms_instruction.html
- Stricker, Jason. "The 5 Shifts Healthy PLCs Make." *Insight Blog*, February 28, 2017.
<http://www.insighteducationgroup.com/blog/5-shifts-healthy-plcs-make>
- Stricker, Jason. "Back-to-School Prep for School Leaders." *Getting Smart*, July 16, 2016.
<http://www.gettingsmart.com/2016/07/back-to-school-prep-for-school-leaders/>
- Stricker, Jason and Michael Moody. "Why Video Is Essential for All Educators in the Teacher-Feedback Process." *Education Week*, July 12, 2016.
http://blogs.edweek.org/edweek/education_futures/2016/07/why_video_is_essential_for_all_educators_in_the_teacher_feedback_process.html
- Stricker, Jason. "A research-based approach to instructional coaching." *Smartblog on Education*. *SmartBrief*, January 27, 2016.
<http://www.smartbrief.com/original/2016/01/research-based-approach-instructional-coaching>
- Stricker, Jason and Michael Moody. "Calibrating Coaches: 4 Reasons to Foster Great Instructional Coaching." *Education Week*, November 13, 2015.
http://blogs.edweek.org/edweek/education_futures/2015/11/calibrating_coaches_4_reasons_to_create_a_vision_for_great_instructional_coaching.html
- Moody, Michael and Stricker, Jason. *Strategic Design for Student Achievement*. New York, NY: Teachers College Press, 2008.

Dr. Andrea Thomas-Reynolds

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EDUCATION/CERTIFICATION

University of Pennsylvania, Philadelphia, PA Doctor of Education in Educational & Organizational Leadership	2005
Southern New Hampshire University. Manchester, NH Master of Science in Community Economic Development	1999
Loyola University of New Orleans. New Orleans, LA Master of Science in Business Administration	1995
Louisiana State University. Baton Rouge, LA Bachelor of Science in Accounting	1991

EXPERIENCE

Insight Education Group, Inc. Encino CA Managing Director	Dec. 2023 -Present
<ul style="list-style-type: none">Oversee the management of all business development, grant operations and team leadership focusing on improving education outcomes for district partnersDevelop and implement growth strategies, including the development of project scope and identifying district partners to pursue multi-year federal grant funding promoting teacher effectiveness and student achievementPartner with research evaluators to complete annual reports and white papers and host annual conferences to maintain a strong industry presencecareer ladder opportunities within the organization to grow and retain staff	
Senior Vice President	Feb. 2019 – Dec. 2023
<ul style="list-style-type: none">Contract service delivery and the administration of the \$24.5 million Empowering Educators to Excel (E3) program funded through the US Department of Education's Teacher and School Leader (TSL) grant with districts in Texas, South Carolina, Indiana, and Delaware.Managed a \$22.5 million TSL 2020 grant with Project IGNITE (Innovation Generated by a Networked Improvement Team of Educators) to enhance teacher effectiveness and the recruitment and retention through the development of career ladder opportunities educators in Florida, Texas, Mississippi, and New York.	
Pinnacle Learning Systems, LLC. New Orleans, LA Founder	August 2012-Present
<ul style="list-style-type: none">Founder and guiding force behind a top consortium of educational consultants offering advisory services,, organizational restructuring, and transitional leadership services to non-profit organizationsExpansion of advisory and consulting services to charter school clients and non-profit mission-driven organizations and education service providers.Negotiated and closed on numerous contracts to support academically challenged school districts across the states of Florida and Louisiana.	

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- Credited with securing vital charter renewals for clients and stepping in to serve in interim administrative leadership roles during crucial periods.
- Provide coaching and strategic consulting services to TrueSchools, Inc. and the school design teams in North Carolina and Nebraska
- Planning of start-up activities for the opening of a conversion and new charter school in Baltimore, MD.

Athlos Academies. Boise, ID

President & Chief of Network Growth

Sept. 2017- July 2018

- Executive leader mandated to optimize the operational capabilities of all organizational areas including human resources (HR), program development & management, marketing, finance, Sales Departments, and School Operations teams located in four different states.
- Delivered on the commitment to build organizational talent at the leadership level with a focus on strategizing the recruitment and hiring of top School Directors and Department Heads.
- Pioneered an organizational change to develop processes, organizational procedures to meet or exceed the charter school objectives for schools in Minnesota, Utah, and Louisiana.
- Spearheaded the development of a new K-8 school in Jefferson Parish with an initial year budget of \$9.5 million to serve over 925 students for the 2018/2019 school year.

Pearson North America Learning Services. Gulf Coast Region

Market General Manager

Jan. 2014 - Sept. 2017

- Directed, coached, and mentored a high-performance 10-member team of sales managers and consultants selling K-12 science, literacy, and math curriculum to charters, private, independent, and traditional school districts across AL, AR, MS, and LA.
- Facilitated regular forecast calls and meetings with key stakeholders to strategize and track sales performance.
- Spurred a 10% increase in sales from 2014 to 2015 despite a massive 50% reduction in sales team headcount.
- Designed and focused the sales strategy for selling curriculum products to decision makers and trade exhibits.

Algiers Charter Schools Association. New Orleans, LA

Chief Executive Officer

June 2009 - June 2012

- Optimized the operational performance of the ACSA network while prioritizing allocation of a \$60M operating budget and directing a team of 10 direct reports and 700+ staff across 9 cluster schools serving approximately 5,500 students.
- Proudest of school performance growth scores increasing by 17.6 points and ACSA ranking as the highest performing charter organization in the state of Louisiana during my tenure.
- Delivered monthly reports to the board of directors on the financials, operations, and academic progress of the schools and overall network.
- Significantly increased brand recognition and awareness for ACSA as the largest charter management network in MS, AL, LA, and AR
- Developed an annual report for the association that provided more transparency to stakeholders about the academic and financial performance of schools in the network.

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Edison Learning, INC. New York, NY

Regional General Manager

July 2005 - April 2009

- Designated as the chief regional liaison with state charter boards of education across MD, PA, GA, and LA.
- Succeeded in winning the renewal for three charter schools in Maryland in addition to the approval for three new schools in Louisiana servicing a combined 3K+ students and generating over \$27M in revenues.
- Engaged in oversight of 12 direct reports and an additional 350+ indirect staff across all four states.
- Worked cross functionally with technology, human resources, finance, marketing, enrollment, and academic service departments to provide tailored support to schools under my supervision.

University of Pennsylvania. Philadelphia, PA

Director (Say Yes to Education, Inc.)

July 2000-June 2005

- Recruited to serve as the executive leader for the Philadelphia, Cambridge, and Hartford chapters of a leading nonprofit organization providing financial scholarships, counseling, and social services to support students as they begin their education in kindergarten all the way through their high school and post-secondary studies.
- Instituted a number of improvements to further develop the Bryant Chapter (Philadelphia) for kindergarten students that, in turn, extended scholarship opportunities to their siblings and parents.
- Management responsibility for a \$4.0 million operating budget for national chapters (Philadelphia, Hartford and Cambridge) to support program expansion to New York City.
- Built collaborative relationships with Philadelphia public schools to align academic enrichment supports with curriculum; Developed academic and social transitional plans for students in elementary, secondary, and postsecondary institutions.
- Served as the point of contact for the Say Yes to Education Foundation with the University of Pennsylvania for tax, audit, and program compliance purposes while enrolled in UPENN's Graduate School of Education Mid-Career Doctorate Program in Educational Leadership and Organizational Management,

Previous experience for seven years in nonprofit management and community economic development as Executive Director of the Ogontz Avenue Revitalization Corporation (Pennsylvania) and the Jefferson Housing Foundation (Louisiana)

PROFESSIONAL MEMBERSHIPS/ AFFILIATIONS

- International Coaching Federation (2017 – Present)
- Gulf Coast Chapter International Coaching Federation (2017 – Present)
- National MBA Association (2018 – Present)
- Association for Talent and Development (2017 – Present)
- Board Member, Algiers Economic Development Foundation (2011-2012)
- Louisiana Master Plan Educational Standards Review Committee (2011)
- Louisiana Department of Education's Advisory Committee on Educator Evaluation (2011)
- New Orleans Mayor's Education Taskforce (2010)
- Educate Now! Governance Return Model Taskforce (2010-2011)
- Reviewer, National Association of Charter School Authorizers (2010)

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- Board Member, Philadelphia Black Alliance for Educational Options (2002-2008)
- Executive Board Member, Greater Philadelphia Urban Affairs Coalition (1998-2005)
- Reinvestment Fund Community Loan Services Committee (1998-2007))
- National Congress for Community Economic Development (1996-2000)

CERTIFICATIONS/ CREDENTIALS

- Certified Executive Coach, Center for Executive Coaching, 2017

COMMUNITY SERVICE

- Delta Sigma Theta Sorority, Inc (1988 – Present)
- The Links, Incorporated , New Orleans (LA) Chapter (2022 - Present)
- Board Member, Start the Adventure in Reading (2016-2018)
- Reinvestment Fund National Advisory Panel, (2011-Present)
- Jack & Jill of America Inc. New Orleans Chapter Member (2011 – Present)
- NOLA Jack and Jill Foundations Chairperson (2016 – Present, 2012-2014)
- NOLA Jack & Jill Teen Sponsor (2014-2016); NOLA Jack & Jill Chairperson of Children's Cluster (2012)
- The Reinvestment Fund Board of Directors (2002-2009)

Aurora Lora

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EDUCATION/CERTIFICATION

Harvard University. Cambridge, MA M.Ed. in Education Policy and Management	2005
University of St. Thomas. Houston, TX M.Ed. in Education, K-12 Principal Certification for Texas	2005
University of Texas at Austin. Austin, TX B.A. in Plan II Honors and Psychology Honors	2000

SUMMARY

Aurora Lora is a seasoned education leader with extensive experience in strategic planning, equity audits, and leadership development. As a former teacher, principal, and superintendent, she has a proven track record of driving meaningful change in large, urban districts.

EXPERIENCE

Insight Education Group, LLC. Eagan, MN Senior Associate	2021-Present
<ul style="list-style-type: none">• Works on a variety of projects that support school leader and principal supervisor effectiveness• Leads strategic planning processes and conducts equity audits with school districts Examples of Clients include: <ul style="list-style-type: none">• DeKalb County School District, GA: Led the district and community through the process to develop a 5-year district strategic plan• La Honda-Pescadero Unified School District, CA: Conducted a district equity audit highlighting the district's strengths, areas of growth, and recommendations for implementation• Indianapolis Public Schools, IN: Developed and implemented a year-long principal residency program	
Uplift Education. Dallas, TX Chief of Schools	2019-2021
<ul style="list-style-type: none">• Provided oversight and supervision of administrators and school staffs in 43 charter schools throughout the Dallas / Fort Worth metroplex• Supervised and evaluated a team of 7 managing directors of schools and the parent engagement team for the network• Planned and delivered monthly professional development sessions for school leaders and provided ongoing coaching in instructional leadership during site visits to schools• Developed and monitored plans of assistance for administrators who were rated unsatisfactory on their mid-year or end-of-year evaluations	
Oklahoma City Public Schools. Oklahoma City, OK Associate Superintendent & Superintendent	2014-2018

Aurora Lora

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- Served as associate superintendent overseeing curriculum, federal programs, and school leadership before being named superintendent in April 2016
- Provided oversight for the education of 46,000 students across 54 elementary schools, 16 secondary schools, 2 alternative schools, and 15 charter schools
- Employed approximately 4,600 administrators, teachers, and support personnel who served a student population that was 54% Latino, 24% African American, and 15% Caucasian. Additionally, 90% of the students qualified for free/reduced lunch and 33% of the students were English-language learners.
- Led the district through a multi-year state budget crisis and revenue failure which required cutting \$30M from the budget in my first 30 days as superintendent, an additional \$10M in cuts during my second year
- Started an Office of School Climate & Culture to provide more discipline support and coaching for schools. Our overall suspensions dropped 30% and long-term suspensions dropped 81% during my tenure.
- Passed a \$180M bond which has allowed us to provide maintenance to our aging facilities, purchase new school buses, and upgrade our technology in schools
- Applied and was awarded district "Community Eligibility Provision" status which means that every child at every school now eats for free in OKCPS

Dallas Independent School District. Dallas, TX

Assistant Superintendent – Strategic Leadership & Division 3 Schools

2012-2014

- Provided oversight and supervision of administrators and school staffs in 49 schools throughout the city of Dallas
- Supervised and evaluated a team of 5 executive directors of schools, 10 academic facilitators, 3 operations coordinators, 1 parent specialist, and 4 administrative assistants which provide support to the 49 schools in our division
- Planned and delivered monthly professional development sessions for principals and executive directors and provided ongoing coaching in instructional leadership during site visits to schools
- Developed and monitored plans of assistance for administrators who were rated unsatisfactory on their mid-year or end-of-year evaluations
- Oversaw a budget of \$220M and a region of 35,000 students

Seattle Public Schools. Seattle, WA

Executive Director, PreK-12 Schools – West Seattle Region

2010-2012

- Provided day-to-day oversight and supervision of administrators and school staffs in 11 elementary schools, 2 middle schools, a K-8 alternative school, 2 comprehensive high schools, and 4 Middle College campuses
- Assisted schools in preparation, development, and review of Comprehensive School Improvement Plans, identifying targets for achievement and strategies to be implemented using local school resources
- Planned and delivered monthly professional development sessions for principals and provide ongoing coaching in instructional leadership during site visits to schools
- Developed and monitored plans of assistance for administrators who were rated unsatisfactory on their mid-year or end-of-year evaluations

Portland Public Schools. Portland, OR

Principal, Tubman Middle School & School Founder,

Aurora Lora

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- Harriet Tubman Leadership Academy for Young Women 2006-2010
- Served as the final principal of Harriet Tubman Middle School for one year before closing the school down to re-open it as the new public all-girls school
 - Served as the founder of the only public all-girls middle/high school in the state of Oregon
 - Started a district-wide magnet program to attract young women into careers in engineering
 - Wrote and was awarded grants totaling over \$50,000 to support math/science education for low-income girls
 - Served on the Superintendent's Action Team for High School Redesign
- Intern to the Superintendent / Project Specialist (Office of School Leadership) 2005-2006
- Served as district lead for the conversion of a failing middle school into the Harriet Tubman Leadership Academy for Young Women in grades 6-12
 - Conducted research on high-performing, high-poverty schools and organized site visits to schools in New York City and Houston
 - Assisted with the development and implementation of the Jefferson High School Redesign initiatives
 - Served on the district Wellness Advisory Committee
- Ryan Elementary School. Houston, TX
- 4th Grade Teacher & Instructional Coordinator 2000-2004
- Helped 4th grade students make significant academic gains in standardized test scores and class performance measures
 - Served as Language Arts Chairperson, Spelling Bee Coordinator, Personnel Committee Chairperson, School Decision-Making Committee Co-Chair, & 4th Grade Department Chair
 - Coached 34 first-year teachers as the fourth grade content team leader for Teach For America Houston
 - Was the subject of a book written by Teach For America titled Ms. Lora's Story which has been read by over 10,000 new teachers across America

HONORS/AWARDS

- 2016 Graduate of the Broad Superintendents Academy
- 2016 Named one of the "40 Under 40" award winners for Oklahoma City by okc.BIZ
- 2012 Selected to be the keynote commencement speaker for the University of Texas Plan II Honors commencement ceremony
- 2010 Named one of the 125 "Extraordinary Exes" by the University of Texas from a list of over 400,000 alumni – one of only 5 educators to make the list
- 2010 Book excerpts of Ms. Lora's Story published by Jossey-Bass; Full book published online and in podcast at www.teachingasleadership.org
- 2009 Outstanding Young Texas Ex Award Winner – Named one of four University of Texas alumni under the age of 40 recognized for distinguished work in their fields
- Stevens Trust Fellowship, Harvard Graduate School of Education (2004 and 2005)
- 2003 Ryan Elementary School Teacher of the Year – Houston, TX
- 2003 Houston ISD North Central District Teacher of the Year Finalist

Sierra Leickert

2805 Dodd Road, Suite 200 ● Eagan, MN 55121
Phone: 888-755-9891
E-Mail: sierra.leicker@insighteducationgroup.com



EDUCATION/CERTIFICATION

University of Virginia. Charlottesville, Virginia 2018
Master of Public Policy

University of Virginia. Charlottesville, Virginia 2017
Bachelor of Science in Education
Psychology & Youth and Social Innovation

SUMMARY

Sierra Leickert serves as an Analyst at Insight Education Group. She is primarily responsible for supporting equity evaluations across the company's entire Equity Analysis and Support portfolio. Sierra integrates collected qualitative and quantitative data to generate project findings that communicate actionable insights to district partners in a final equity audit report. Sierra supports members of the Service Delivery team to conduct research and data analysis and to produce client-facing documents, resources, and tools.

EXPERIENCE

Insight Education Group, LLC. Eagan, MN 2023-Present
Analyst

- Project management over various portfolios and contracts
- Collect and analyze various data sources and write reports that synthesize these data
- Conduct focus groups with district and school leaders, board members, staff, families, and students
- Provide support across a portfolio of contracts with schools, districts, and state education agencies
- Develop content and materials for support of service delivery and fulfillment of company contracts
- Produce client-facing documents, resources, and tools (slide decks, participation and facilitation guides, surveys, research briefs, dashboards etc.)

Examples of clients include:

- Charlottesville City Schools, VA: Served on the Strategic Planning team – created and designed a dashboard with data visualizations corresponding to district priorities using Looker Studio.
- Park City Public Schools, UT: Served on the District-Wide Equity Audit team – reviewed and analyzed quantitative data and documents provided by the district, monitored stakeholder surveys, took notes for focus groups, and assisted with the development, editing, and publication of the final audit report.

PrepMatters. Bethesda, Maryland 2022-2023
Educational Counselor

- Independently manage a client caseload consisting of juniors and seniors who are completing the college application process
- Create content for the company's social media platforms including videos for TikTok, posts for Twitter, and blogs for the website
- Plan and lead virtual and in-person information sessions on various higher education topics such as college list creation, planning college visits, and application essays

Sierra Leickert

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Phone: 888-755-9891

E-Mail: sierra.leicker@insighteducationgroup.com



DC Prep. Washington, District of Columbia

2020-2022

Lead Math Teacher

- Redesigned a middle school math curriculum for a virtual environment
- Utilized statistical analysis to leverage data from beginning-of-year assessments to improve the math curriculum and meet students' needs when returning to in-person learning
- Developed a tool for the math department to track and analyze student progress using Microsoft Excel
- Led grade-level math department meetings to increase collaboration and the sharing of resources among staff

Morris Jeff Community School. New Orleans, Louisiana

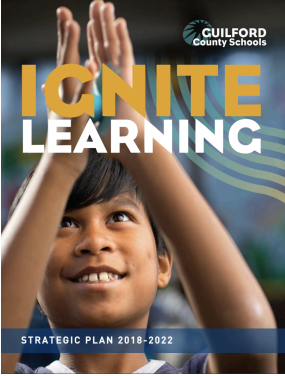
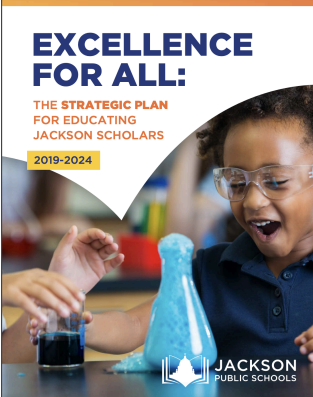
2018-2020

Middle School Science Teacher

- Designed and implemented a science curriculum that resulted in 62% of students passing and an additional 32% getting advanced on the 2018-2019 state test, both of which were the highest in the middle school
- Partnered with multiple stakeholders including parents, other faculty, and outside organizations to improve the curriculum and provide experiential learning opportunities for students
- Promoted equity in the classroom resulting in over 95% of African-American females earning "high proficiency" distinction in scientific writing

Tab 3 – References

Insight will leverage our extensive strategic planning experience in our partnership with the Mississippi Department of Education and support the unit in developing its next five-year strategic plan. The following provides an overview of some of our recent strategic planning projects. All of these projects required successfully developing consensus-based strategic plans, gathering and utilizing data to inform the strategic planning process, incorporating the district’s mission, vision, and programs, and maintaining a high level of project management, clear communications, and high-quality resource development while keeping projects on time and within budget. With this experience, we are well-positioned to provide excellent support to MDE.

School District (Click the link to view the full plan)	Sample Strategic Plan
Guilford County Schools	
Jackson Public Schools	

[The School District of Philadelphia](#)



Relevant Strategic Planning Experience

On the following pages, you will find Appendix C: References. The remainder of the page is intentionally left blank.

Appendix C - References

Client Name	Jackson Public Schools
Contact Name and Title	Dr. Errick Greene- Superintendent
Contact Address	662 South President Street, Jackson, MS 39201
Contact Telephone Number	(601) 960-8700
Email Address	ergreene@jackson.k12.ms.us
Type of work provided to the client	Conceptualized and facilitated the development of a 5-year strategic plan.
Effective contract dates for the time frame services were/are being provided to client	May 2019-present

Client Name	Delaware Department of Education
Contact Name and Title	Maria Rodriguez- Education Associate, Multilingual Learners
Contact Address	John G. Townsend Bldg, 401 Federal Street, Dover, DE 19901
Contact Telephone Number	(302) 735-4097
Email Address	Maria.Rodriguez@doe.k12.de.us
Type of work provided to the client	Conceptualized and facilitated the development of a 5-year Multilingual Learner (MLL) strategic plan.
Effective contract dates for the time frame services were/are being provided to client	September 2022 - September 2023

Client Name	School District of Philadelphia
Contact Name and Title	Dave Zega, Deputy Chief for Strategic Planning
Contact Address	440 N. Broad Street, Philadelphia, PA 19130
Contact Telephone Number	(215) 400-6811
Email Address	dzega@philasd.org
Type of work provided to the client	Conceptualized and facilitated the development of a 5-year strategic plan.
Effective contract dates for the time frame services were/are being provided to client	September 2022 - present

Appendix C - References (Continued)

Client Name	Maryland State Department of Education
Contact Name and Title	Dr. Carey Wright
Contact Address	200 W. Baltimore Street, Baltimore, MD 21201
Contact Telephone Number	(410) 767-0460
Email Address	carey.wright@maryland.gov
Type of work provided to the client	Supporting planning and implementation efforts between the state and LEAs.
Effective contract dates for the time frame services were/are being provided to client	August 2024 - present

COMPONENT 3 – PRICE

Tab 4 – Price/Budget

The pricing presented represents the projected fees based upon our current understanding of the work and the approach presented in this proposal. However, it is our practice to engage with partners to determine the appropriate scope to meet specific budgets. Should the specifications of the project change, fees will be adjusted accordingly. All pricing is subject to final terms and conditions.

On the following page, you will find Appendix I: Cost Data/Budget. The remainder of the page is intentionally left blank.

Appendix I: COST DATA/BUDGET

	Deliverables	Investment
Phase 1	Project Work Plan	\$8,200
	Stakeholder Engagement Plan	\$12,300
	SWOT Analysis and Environmental Scan Report	\$23,562.50
	Draft Strategic Plan and Scorecard	\$12,687.50
	Final Strategic Plan and Performance Scorecard (includes graphic design)	\$28,175
	Final Presentation and Training by August 1	\$12,075
Phase 2	Implementation Roadmap	\$16,650
	Monitoring and Reporting Protocols	\$11,100
Total		\$124,750
<p><i>*NOTE: Travel is included in the above pricing.</i></p>		

COMPONENT 4 – OTHER

Tab 5 – Additional Information

Company Background

Insight Education Group, based in Eagan, MN, is an international educational consulting organization that works with education leaders to develop aligned strategies and provide embedded supports to facilitate educator growth and positively impact student achievement. Since 2000, we have supported schools, districts, charter management organizations, and state education agencies through some of their largest challenges, including:

- successfully turning around chronically under-performing schools,
- engaging systems in the design and implementation of initiatives aimed at directly addressing racial equity,
- creating equity-focused strategic plans,
- providing executive coaching for school and district leaders,
- fostering school cultures around mentoring, coaching, collaboration, and shared knowledge and skills,
- developing guidance for programmatic development and sustainability of initiatives,
- supporting teachers and educational leaders with innovative tools to continue professional learning,
- training aspiring and current educational leaders to be strategic and establish priorities for positive change, and
- helping to change the culture of teacher growth to one of trust.

Through our partnerships with states, districts, and schools across the country, such as Marion County Schools, the Syracuse City School District, and Boston Public Schools, Insight has brought thousands of educators' practices to the next level. We have developed award-winning systems and solutions that are used in schools and districts in the United States and abroad, but it is our commitment to a partner-driven implementation process that sets us apart from others and gets impactful results.

A guiding principle of our work is to build on the synergy of multiple stakeholders and departments to effectively build educators' capacity and implement complex initiatives while avoiding unnecessary duplication of efforts. We do not simply facilitate meetings; we bring our experience and perspective to the discussion with our partners to ensure that their decisions are informed and will have the greatest impact. Our breadth of knowledge and experience as providers of diagnostic services, technical assistance, and professional learning gives us the

unique ability to see the bigger picture and align all of our work to a partner's vision for success.

Our Core Values

We strive to address equity every day, in all that we do. Equity is the driving force behind all of our decisions, including: hiring diverse professionals, empowering teachers and school leaders, creating tools and culturally responsive resources, and participating in and facilitating conversations around bias, prejudice, and race. We will forever be champions of equity.

We are a team of leaders. We are all independently strong but collaborate intentionally to approach our work with purpose, flexibility, and a relentless pursuit of excellence.

We are educators. As former teachers, administrators, and district leaders, we are a team of educators who value continual reflection and refinement in all that we do. We work collaboratively with partners to generate innovative solutions to systemic challenges.

We are lifelong learners. In order to be catalysts of change, we have to stop pretending that the status quo is working and commit to permanently impacting the educational landscape through our own continuous development.

We thrive in a dynamic environment. We are flexible and adapt to meet the ever-changing needs of our partners while being motivated by their success, the success of our organization, and each other.

We place a high value on supporting one another and having fun. We're an all hands on deck, inclusive group that recognizes the importance of a positive team culture. Simply said, we love what we do, who we work with, and we have fun in the process.

How We Work

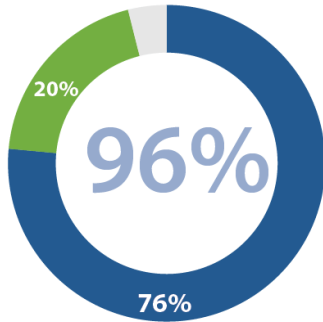
We begin every engagement with a thorough implementation planning process to clarify goals and establish agreed-upon timelines and deliverables for the work. Weekly Status Reports will be developed and sent by the Partnership Manager to identified project stakeholders to ensure open communication. Regular Executive Check-Ins will also be scheduled and held between District project leaders and Insight's Executive Sponsor to make any necessary modifications and further guarantee the success of the work.

We also consistently seek feedback from stakeholders through a variety of mechanisms, including focus groups and partner surveys, and make appropriate adjustments to our services.

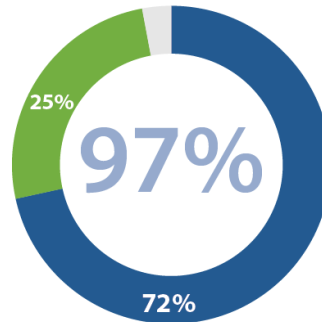
The following graphic is a snapshot of our most recent Partner Satisfaction Survey results.

Insight Education Group Partner Satisfaction Survey

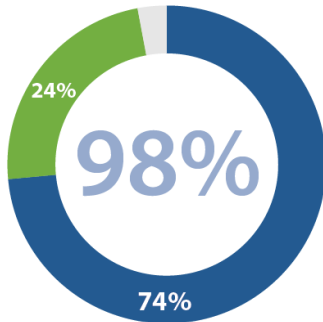
■ Very Satisfied ■ Satisfied



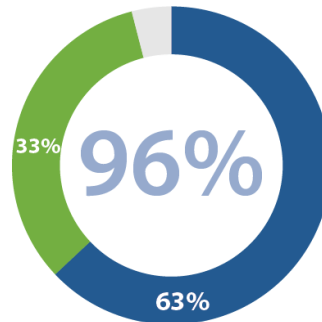
Percent of partners who are satisfied or very satisfied with the knowledge and expertise of Insight's associates.



Percent of partners who are satisfied or very satisfied with Insight's associates' knowledge of the unique aspects of their organization.



Percent of partners who are satisfied or very satisfied with Insight's ability to meet timelines and accomplish deliverables.



Percent of partners who are satisfied or very satisfied with the impact of Insight's services on their organization.

Where We Work

We specialize in developing close relationships with partners to understand their unique challenges and design practical solutions that get results. For over two decades, Insight has worked with thousands of educators in districts and schools nationwide, including:

DISTRICTS & STATES		GOVERNMENT & ED ORGS
<ul style="list-style-type: none"> • Achievement School District (TN) • ACCEL Charter Network (OH) • Alliance College-Ready Schools (CA) • Apple Academy Charter Public Schools • Baltimore City Public Schools (MD) • Bartholomew Consol. School Corp (IN) • Bassett Unified School District (CA) • Bastrop Independent School District (TX) • Bayshore Elementary School District (CA) • Boston Public Schools (MA) • Bozeman Public Schools (MT) • Burlington School District (VT) • Cabrillo Unified School District (CA) • Caesar Rodney School District (DE) • Chappaqua Central School District (NY) • Chapel Hill-Carrboro City Schools (NC) • Chester County School District (SC) • Chicago Public Schools (IL) • Citizens of the World Charter Network • Clark County School District (NV) • Colonial School District (DE) • Colorado Department of Education (CO) • Colorado Springs School District 11 (CO) • Delaware Department of Education (DE) • Denver Public Schools (CO) • District of Columbia Public Schools (DC) • Douglas County Schools (GA) • Dublin Unified School District (CA) • Dunkirk City Schools (NY) • East Baton Rouge Parish Schools (LA) • Everett Public Schools (MA) • Ferguson-Florissant School District (MO) • Franklin Northeast Supervisory Union (VT) • Freeport Public Schools (NY) • Gainesville ISD (TX) • The Governor's Office of Student Achievement (GA) • Green Dot Public Schools (CA) • Greenville ISD (TX) • Guilford Public Schools (CT) • Guilford County Schools (NC) • Gulliver Prep (FL) • Highland Falls School District (NY) • Highline Academy Charter School (CO) • Indianapolis Public Schools (IN) • Jackson-Madison County Schools (TN) • Jackson Public Schools (MS) • Jersey City Public Schools (NJ) • Kennett Consolidated School District (PA) • KIPP LA (CA) 	<ul style="list-style-type: none"> • Laurens County School District 56 (SC) • Lindsay Unified School District (CA) • Long Beach Unified School District (CA) • Los Angeles Unified School System (CA) • Lost Hills Union School District (CA) • La Honda-Pescadora Unified School District (CA) • Lucia Mar Unified School District (CA) • Mansfield Public Schools (CT) • Maplewood Richmond Heights SD (MO) • Marion County School District (SC) • Marlboro County School District (SC) • Maryland State Dept. of Education (MD) • Memphis City Schools (TN) • Metro Nashville Public Schools (TN) • MSD of Decatur Township (IN) • Midland Public Schools (MI) • Milford School District (DE) • Mississippi Department of Education • Montague Charter Academy (CA) • School City of Mishawaka (IN) • New Schools for New Orleans (LA) • Newark Public Schools (NJ) • Newton County Schools (GA) • New York State Department of Education • Ohio Department of Education • Passaic Public Schools (NJ) • Queen Rania Teacher Academy (Jordan) • Racine Unified School District (WI) • Roanoke City Public Schools (VA) • Rockford Public Schools (IL) • Rowan Salisbury Schools (NC) • School District of the City of York (PA) • School District of Palm Beach County (FL) • School District of Philadelphia (PA) • School District of the Superior (WI) • Shelby County School District (TN) • St. Hope Public Schools (CA) • Summit Public Schools (CA) • Sumter School District (SC) • Syracuse City School District (NY) • Tennessee Department of Education (TN) • Texas Education Agency • Township District 211 (IL) • Ulster BOCES (NY) • UNO Charter Schools (IL) • Waukee Community School District (IA) • Yakima School District #7 (WA) • York County School Division (VA) • Youth Empowerment Services (TX) • Yuba City Unified School District (CA) 	<ul style="list-style-type: none"> • Aspen Institute • Broad Center for the Management of Schools • California Charter School Association • Community Foundation of Mississippi • Education Service Center of Cuyahoga • Grimmway Family Foundation • Go! Austin / Vamos! Austin (GAVA) • KIPP Foundation • Mass Insight • Neubauer Family Foundation • Partnership for Los Angeles Schools • Philadelphia Academy of School Leaders • Teach For America • Tennessee Charter School Incubator • The Bill and Melinda Gates Foundation • The KIPP Fisher Fellows Foundation • The New Teacher Project • U.S. Department of Education • University of the State of New York Regents • Vermont School Board Association • Western Region Education Service Alliance

Who We Are

As former teachers, school leaders, and high-level district administrators, we appreciate the challenges, nuances, and opportunities of implementing small- and large-scale systems and initiatives. Additionally, we require that all of our team members engage in ongoing professional learning to continuously hone skills and remain current on best practices.

Tab 6 – Acknowledgment of Amendments

On the following pages, you will find our Acknowledgement of Amendments. The remainder of the page is intentionally left blank.



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: *This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Adam Hall

Authorized Signature

2025-01-16

Date

Adam Hall, Chief Financial Officer
Printed Name

Audit trail

Details

FILE NAME acknowledgement_of_amendment No. 1 RFX 3120003047.pdf - 1/16/25, 10:28 AM

STATUS ● Signed

STATUS TIMESTAMP
2025/01/16
15:33:59 UTC

Activity



SENT

carly.oconnell@k12coalition.com **sent** a signature request to:
• Adam Hall (adam.hall@k12coalition.com)

2025/01/16
15:30:51 UTC



SIGNED

Signed by Adam Hall (adam.hall@k12coalition.com)

2025/01/16
15:33:59 UTC



COMPLETED

This document has been signed by all signers and is **complete**

2025/01/16
15:33:59 UTC

The email address indicated above for each signer may be associated with a Google account, and may either be the primary email address or secondary email address associated with that account.



UPDATED

**Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025**

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Adam Hall

Authorized Signature

Adam Hall

Printed Name

2025-01-29

Date

Audit trail

Details

FILE NAME acknowledgement_of_amendments RFx 3120003047 (#2) UPDATED.pdf - 1/29/25, 11:21 AM

STATUS ● Signed

STATUS TIMESTAMP
2025/01/29
16:32:46 UTC

Activity



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carly.oconnell@k12coalition.com **sent** a signature request to:
• Adam Hall (adam.hall@k12coalition.com)

2025/01/29
16:22:50 UTC



SIGNED

Signed by Adam Hall (adam.hall@k12coalition.com)

2025/01/29
16:32:46 UTC



COMPLETED

This document has been signed by all signers and is **complete**

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16:32:46 UTC

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COMPONENT 5 – APPENDICES

Tab 7 – Appendix F

On the following pages, you will find Appendix F. The remainder of the page is intentionally left blank.

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror’s proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Adam Hall

Title: Chief Financial Officer

Signature: Adam Hall Date: 2025-01-16

Audit trail

Details

FILE NAME UPDATEDAppendix F.pdf - 1/16/25, 10:40 AM

STATUS ● Signed

STATUS TIMESTAMP 2025/01/16
15:44:38 UTC

Activity



SENT

carly.oconnell@k12coalition.com **sent** a signature request to:
• Adam Hall (adam.hall@k12coalition.com)

2025/01/16
15:41:48 UTC



SIGNED

Signed by Adam Hall (adam.hall@k12coalition.com)

2025/01/16
15:44:38 UTC



COMPLETED

This document has been signed by all signers and is **complete**

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The email address indicated above for each signer may be associated with a Google account, and may either be the primary email address or secondary email address associated with that account.

Tab 8 – Appendix G

On the following pages, you will find Appendix G. The remainder of the page is intentionally left blank.

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Tab 9 – Appendix H

On the following pages, you will find Appendix H. The remainder of the page is intentionally left blank.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	



K12 Coalition™

Teaching for the Greater Good

K12 Coalition is a collective of innovative education organizations powered by changemakers with personal insight and experience as teachers, administrators, and district leaders.



Proposal

FEBRUARY 5, 2025

RFX NO. 3120003047

**Strategic Planning and
Performance Scorecard**

State Board of Education, Mississippi

Submitted by:

COLLIN MOORE
VICE PRESIDENT
4320 WEST KENNEDY BLVD
SUITE 200
TAMPA, FLORIDA 33609
888.302.0899
PROPOSALS@MGT.US

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Appendix A – Proposal Cover Sheet

Company/Name: MGT Impact Solutions, LLC

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Patrick J. Dyer, Vice President
Mailing Address	4320 West Kennedy Blvd., Ste 200
City, State, Zip	Tampa, FL 33609
Telephone:	888.302.0899
E-Mail Address:	Proposals@mgt.us

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	Briana Brady, Consultant
Telephone Number	888.302.0899
Email Address	bbrady@mgt.us
Physical Address	4320 West Kennedy Blvd., Ste 200
City, State, Zip	Tampa, FL 33609
Mailing Address	Same as above
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? 3102083637
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: 01/30/2025



COMPONENT 1 – PLAN OF ACTION

Impacting communities for good.

MGT brings **50 years** of experience driving positive social change and performance in education, government, nonprofits, and critical infrastructure/private industries through **assisting clients to strengthen their foundation, change systematically, and enable resiliencies for long-lasting change**. Since inception, MGT has significantly grown in size and capacity – working with state and local governments and education partners. Today, we bring a team of over **900 professionals** who offer in-depth market knowledge and understanding so we can hit the ground running.

MGT is a privately held, employee-owned and financially stable limited liability company with a deep roster of staff and a commitment to serving the public. Our clients care about addressing the world’s most-pressing problems, and so do we. Their “why” is our why.

What sets us apart is our ability to customize and offer individualized support but also the resources of a larger infrastructure to enable flexibility in impacting to-scale. Throughout our history, MGT has successfully delivered more than **30,000 projects** through a thoughtful balance of balancing the “immediate” needs while changing systems to plan for future resilience and success.

Our Commitment

MGT embraces the most complex challenges on the leadership agenda, with deep commitment, agility, and local expertise to make a measurable and profound impact. Simply stated, **We are impacting communities for good.**

MGT | FIRST LOOK

Name: MGT Impact Solutions, LLC (MGT)

Locations: Headquarters in Tampa, FL; branch offices nationwide.

Cooperative Contracts:

ASC 20-7359, 24-7484

OMNIA LS4612

TIPS 220601, 220802, 230105

TXShare 2024-019

Structure: Privately held, employee-owned, client-driven Limited Liability Company.

Lines of Business: Strategy and Implementation, Performance and Operations, IT Infrastructure, and Cyber Security and Resilience for public sector and commercial companies.



50 years

900 consultants

30,000 projects

A Social Impact Commitment

DEFINED BY **IMPACT**

Making a profound impact on society is at the heart of who we are and what we do. By engaging in Strategic Planning and creating a Performance Scorecard that is aligned with the Mississippi Department of Education’s (MDE) mission, goals, and priorities, the results are sure to improve proficiency and growth. This happens through the guidance of effective teachers and leaders who are preparing students to compete in a global economy. The MDE should be proud to make a difference in the lives of the citizens in your state, and we are proud to work with you toward this goal. Our team empowers organizations through innovations in people, processes, and technology to lift and strengthen your solutions.

MGT’s Expertise

Our firm includes more than **900 professionals**, structured into the following primary groups, along with various internal infrastructure groups to support our operations and growth.



Strategy & Implementation

Working alongside an organization’s C-suite, we help leaders co-create strategy through organizational reviews and data analytics to create actionable roadmaps for success.



IT Infrastructure & Digital

We provide engineering expertise to modernize IT infrastructure and ensure your technology implementation is properly designed, integrated, modernized, and maintained.



Cyber Security & Resilience

From real-time, 24/7 monitoring to proactive threat detection and rapid incident response, we can give you the tools to heighten your network’s security posture and keep it there.



Performance & Operations

Bridging the gap between strategy and enduring change, we support efficient revenue allocation, promote economic development, and create fairness in hiring and contracting systems.



Our MGT Vision

To achieve our mission of being the social impact and performance leader in our industry, we are continuously improving to earn the privilege of being selected as our clients’ partner of choice in the mission-critical domains we impact. By elevating education systems, managing and securing critical networks, solving complex human capital and fiscal problems, and advancing equity as a performance imperative, we can impact communities, for good through client partnership.

We deliver these solutions through our “three-point stance” of technology, education, and performance offerings. With our long-term vision of creating profound social impact through client performance, we seek out the “best of the best” to join us in our work supporting clients’ top priorities.

Markets we serve:

- Higher Education
- Prek-12
- Government
- Nonprofits
- Commercial Industries

PEOPLE



We believe in the power of connecting people and ideas which solve mission-critical, complex challenges to foster a trusted connection with our clients...for life.

PURPOSE



We are led by a transformative movement, fueled by people, innovation, and solutions designed to provide enduring opportunities for prosperity and well-being.

PERFORMANCE



We partner with clients to advance learning outcomes, reduce operational costs, recover revenue, improve workflows, and provide resilient and hardened technology networks and infrastructure.

Tab 1 – Production/Detailed Service Plan

Experience & Qualifications

Incomparable Consulting Expertise.

The MGT team has supported hundreds of strategic engagements with K-12 school districts and systems of all sizes and environments across the United States and internationally. Included below is an exemplary subset of projects that:

- Highlight our general capacity and expertise to deliver high stakes solutions to leading districts and nonprofit organizations.
- Underscore our ability to deliver the specific scope and requirements for this engagement with the Mississippi Department of Education.

Please see the **COMPONENT 4 – OTHER section** at the end of this proposal for a list of all K-12 clients we have the pleasure of calling partners. Within existing partnership examples, we are proud to note that we bring a history of launching teams swiftly and engaging in partnerships to have instant impact.

NEW MEXICO PUBLIC EDUCATION DEPARTMENT | STRATEGIC PLANNING & IMPLEMENTATION

MGT launched and now manages the New Mexico Student Success Network, a statewide coalition of districts focused on effectively implementing state priorities, in partnership with the Permian Strategic Partnership, the Governor’s Office, and the Public Education Department (PED). The coalition’s priorities, spurred by recent legislation, include access to early childhood education, safe and conducive learning environments, research-based literacy instruction, and pathways to college and careers. MGT convenes the network and provides participating districts with technical and strategic support. This includes diagnostic analysis, goal setting, and implementation planning.

TEXAS EDUCATION AGENCY | SYSTEM OF GREAT SCHOOLS

MGT has served as System of Great Schools Executive Advisor to numerous Texas school districts in the past several years including Houston, Midland, Aldine, Judson, Grand Prairie, and Tyler Independent School District (ISD). In this capacity, we have supported the design, launch, and implementation of high-quality district-charter partnership schools and expanded access to excellent educational opportunities for underserved students across the state. MGT has worked with these districts to implement annual Quality Seats Analyses to leverage selection of high quality partners and improve overall seat quality. Further, in its role as an Executive Advisor, MGT has built project management and planning capacity among district leadership through coaching sessions on topics including strategic thinking, agenda planning, and stakeholder engagement. This work has included the development of key resources and materials on authorizing policies, performance contracts, accountability frameworks, and monitoring processes, as well as coordinating financial and operational assistance.

ALDINE INDEPENDENT SCHOOL DISTRICT (TX) | STRATEGIC PLANNING

MGT partnered with Aldine ISD to develop a 5-year strategic plan articulating the district’s mission, vision, anchor goals, and five strategic priorities – student achievement, school culture, mission-driven leadership, organizational efficiency, and community engagement and outreach – each with aligned sub-actions to ensure effective implementation. MGT has also supported

COMPONENT 1 – PLAN OF ACTION

Aldine in codifying its effective schools framework, titled the “Aldine Way.” In addition, MGT has served as Executive Advisor to Aldine ISD as part of its participation in the System of Great Schools Network since 2019, with a focus on designing and implementing an annual planning process oriented around the district strategic plan, mission and vision, and North Star goal for high quality schools. In this capacity, MGT has worked to cohere divisional initiatives and school actions around strategic priorities and align grants, programs, and initiatives. These coordinated efforts will ensure the effective implementation of an aligned, system-wide approach to accelerating outcomes for all Aldine students.

KNOX COUNTY (TN) | STRATEGIC PLANNING & IMPLEMENTATION

MGT is partnering with Knox County Schools Region 5 to develop a strategic plan for the district’s path forward. MGT has completed high-level data analysis to deeply understand the current state of the district and what success looks like going forward. The team has engaged deeply with district leadership to co-create strategic priorities with aligned outcomes, metrics, and actions. As part of this effort, MGT has also conducted extensive stakeholder engagement through outreach, surveys, and focus groups with students and families, community leaders, educators, and campus leaders. Throughout the partnership, MGT has created high-quality project management structures to ensure timely completion of all key deliverables with the ultimate intention of creating cross-functional implementation work plans that will bridge Region 5 to robust, execution-oriented performance management and progress monitoring systems.

GENESEO SCHOOL DISTRICT (IL) | DATA COLLECTION & STRATEGIC PLANNING

MGT engaged with Geneseo School District to conduct individual school and districtwide needs assessments with associated reporting and root cause analyses. We collected data from every classroom, conducted interviews of all teachers and leaders, and facilitated focus groups of students, families, support staff, and school board members. We conducted a comprehensive survey related to research-based improvement priorities in the domains of instruction, leadership, culture, and collaboration. We followed a convergent parallel mixed methods design, in which we collect all data concurrently, and then analyzed the qualitative and quantitative findings side by side. We did this to strengthen overall analysis. We downloaded and heat mapped descriptive statistics linked to all quantitative data. We leveraged magnitude coding to indicate whether findings in qualitative data (including interviews, focus groups, observations, and artifacts) represent positive (+) or negative (-) representations for each improvement domain. From this process, we created school-specific reports as well as a report for all elementary schools and the district. We engaged in strategic action planning with the district and with school leadership teams to prioritize actions and next steps. This process, collecting data from over 6,000 families, 300 teachers, 40 leaders, and all students took three weeks from preliminary planning to reporting and action planning.

TEXAS EDUCATION AGENCY (TEA) | CENTER FOR SCHOOL ACTIONS

MGT supported the TEA with the development, launch, and management of its Center for School Actions (CSA) – a support center that connects districts and schools with resources, tools, and guidance to help plan aspirational, bold, and evidence-based school actions. These actions include new school design and launch, school “restart” or “redesign,” and enrollment changes. Through this partnership, MGT facilitated access to millions of dollars in funding to districts via the state’s School Action Fund (SAF) in support of innovative, holistic strategies that transform existing school models or create new options. We also supported the state’s efforts to build an integrated data repository to monitor and assess the effectiveness of school actions in order to inform program design and ensure continuous improvement.

TEXAS EDUCATION AGENCY | RESILIENT SCHOOL SUPPORT PROGRAM (RSSP)

MGT has served as an approved technical assistance provider to TEA for the past two years. Since 2020, we have served more than 50 districts in adapting to and addressing the unique learning needs brought on by the pandemic. Our communities across Texas range from rural to large urban settings. We begin our engagement with each district in a data-driven strategic planning effort to identify needs, establish specific goals, and develop an implementation plan. The strategic planning process incorporates student data, feedback from district leaders, and input from school and community stakeholders. These plans are a significant marker in helping districts organize its resources and community towards accelerating learning. We then support districts as side-by-side partners in multi-year implementation efforts, progress monitoring, and data collection and analysis. Implementation support may also include professional development or instructional and leadership coaching.

KANSAS CITY PUBLIC SCHOOLS (MO) | BLUEPRINT 2030 STRATEGIC PLAN SUPPORT

MGT is working with Kansas City Public Schools (KCPS) to execute the third and fourth phases of their Blueprint 2030 planning process. The District has already undertaken the first two phases, which assessed where they were and amassed valuable community feedback on where they wanted to be. In the final phases, MGT is leading the creation of interim reports summarizing previous findings and developing a suite of recommendations aligned to the pillars of the KCPS strategic plan. In addition, MGT is supporting KCPS with progress and performance management to ensure organizational priorities are implemented with fidelity.

GWINNETT COUNTY PUBLIC SCHOOLS (GA) | ORGANIZATIONAL EFFECTIVENESS REVIEW

Under new Superintendent Dr. Calvin Watts, Gwinnett County Public Schools (GCPS) has launched a review of district organizational functions and performance in partnership with MGT to ensure efficiency and effectiveness throughout all departments. MGT has led deep diagnostic engagement and quantitative analysis with GCPS leaders and stakeholders, including review of financial data, school quality, and alignment of organizational structures and decision making to priority initiatives. This review and feedback will support the realization of organizational objectives and help the district meet target benchmarks based on relevant market characteristics, identification of duties performed by individual staff at a granular level of detail, and alignment of functions to economic and academic value. With a more effective organizational structure, GCPS will be able to better serve schools and, ultimately, students. Cost savings realized will go towards initiatives aimed at serving the whole child and GCPS' most at-risk students.

MIDLAND ISD (TX) | SYSTEM OF GREAT SCHOOLS STRATEGIC SUPPORT

MGT has served as Executive Advisor to Midland ISD as part of its participation in the System of Great Schools Network since 2017, providing strategic execution support for a wide range of activities, including the creation and adoption of a North Star goal to guide the district's work; conducting an annual planning process including the development of a Quality Seats Analysis data visualization dashboard to analyze district and school performance; stakeholder engagement via multiple Listen & Learn tours; the launch and expansion of an Office of Transformation; design, development, and launch of a local School Performance Framework tool; and cohering the district's many grants, programs, and initiatives.

NEW YORK CITY DEPARTMENT OF EDUCATION | STRATEGIC DIRECTION & IMPLEMENTATION SUPPORT

MGT has supported the NYC Department of Education (DOE) with articulating its strategic direction and both district-wide and divisional priorities. This support included planning and facilitation of a 2-day leadership session in which we focused on identifying mission, vision, and goals at the district level to structure decision making, divisional priorities, internal change management, and external communications. Following this goal setting and vision phase, we have provided targeted implementation advising for the Chancellor and district leaders to build capacity and ensure alignment between divisional goals, as well as ad hoc material and agenda creation for priority items.

SALT LAKE CITY (UT) | STRATEGIC PLANNING

MGT supported Salt Lake City with city-wide strategic planning efforts, engaging with key stakeholders including the mayor's office, city leaders, and Salt Lake City residents with the goal of collecting best practices for leading cities, conducting research on stakeholder priorities, and ultimately providing a structured plan for carrying out and implementing key objectives. As part of this effort, MGT collected and analyzed survey data and focus group data from Salt Lake City residents; analyzed best practice governing policies at cities comparable to Salt Lake City; conducted in-depth interviews with key stakeholders; led strategic planning workshops and created a 5-pillar strategic plan; elicited buy-in to new strategic plans from Elected Officials at the city, county, and state level; and provided advisory services during the strategic plan implementation phase.

PHILADELPHIA SCHOOLS PARTNERSHIP (PA) | ORGANIZATIONAL STRATEGIC PLANNING

MGT supported the Philadelphia School Partnership (PSP) in charting the direction of a new chapter of organizational development by reimagining its vision, goals, and organization to lead the next phase of education improvement in Philadelphia. To achieve this objective, MGT worked closely with PSP to develop a comprehensive multi-year strategic plan, clearly delineating the role and key actions of PSP, prioritizing strategic investments, and laying out a roadmap for the removal of barriers to economic and social mobility city-wide. MGT engaged with PSP leadership and stakeholders to develop a common set of facts to make the case for change, facilitated a series of design sessions to align around a shared vision, and developed a detailed strategic plan and implementation roadmap.

Scope of Work

A detailed plan with a 2-phased approach specifically designed for you.

OUR UNDERSTANDING OF THE PROJECT

As the nation's leading provider of multi-disciplinary management and technology solutions for K-12 school districts and statewide organizations, MGT Impact Solutions, LLC (MGT) is uniquely well qualified to partner with the Mississippi Department of Education to exceed all your expectations on this Strategic Planning and Performance Scorecard project.

When we engage in strategic partnerships with districts and state organizations, we first aim to learn deeply about the communities we serve. We are a qualified, experienced and responsibly sound organization that has the proven ability to perform all of the core services requested in the Scope of Services to develop a comprehensive strategic plan and performance scorecard for MDE. The plan will align with MDE's mission, goals, and evolving priorities. We deliver high quality results, but take a fiscally responsible approach, providing high value at an affordable

price. By reviewing our qualifications, you will see that we provided strategic planning in an effective and efficient way for organizations that are of a similar size with a similar scope of services.

Our strategic planning support ensures an inclusive and engaging process to inform decision making, coverage of key priorities, and buy-in across MDE. No other firm can match the breadth and depth of the MGT team. We provide industry experts in operational effectiveness and organizational review, human capital, community engagement, public-sector finance, academic transformation, facilities management, and demographics planning.

PROJECT OBJECTIVES AND DELIVERABLES

Proposed Strategic Planning Process Framework

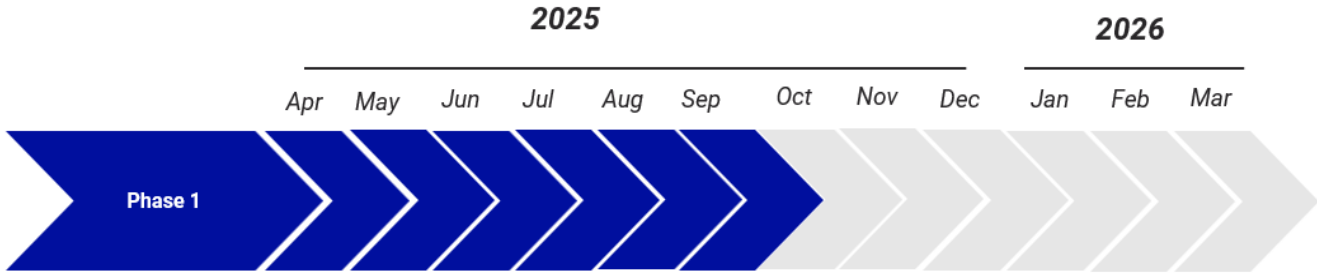
By the end of this partnership, MGT will support MDE leadership in authoring a Preliminary Report and Recommendations for the new MDE Strategic Plan, as well as a Final Report of the Five-Year Strategic Plan upon approval from the Board of Education and all relevant stakeholder groups. We know that the most effective final products are built over an intentional process of inquiry and iteration, and our process relies on strong partnerships. At MGT, we prioritize client relationships and facilitate discussions where we leverage community expertise to spearhead the development of policies that will guide the MDE for the next five years. The MDE will see their feedback and ideas reflected at the heart of the deliverables, with ample, purposeful space for community input and stakeholder involvement.

MGT proposes a detailed plan for project management and stakeholder engagement that incorporates the following elements:

- MGT will initiate the project by holding a kick-off meeting with the MDE team to finalize project scope, objectives, outcome metrics, and responsibilities. This kick-off meeting will have a specific agenda and will be followed by detailed notes summarizing key tasks and action steps for the project partners.
- Immediately following the kick-off meeting, MGT will develop and deliver a detailed, week-by-week timeline for the project that delineates key dates, deadlines, deliverables, events, collaboration and review processes, and status calls/conferences.
- MGT will develop and implement, as specified herein, a comprehensive communication plan that includes bi-weekly status calls and formal written progress reports to the MDE, and periodic focus groups and/or town halls with stakeholders.
- Every status call or conference between MGT and the MDE leadership will be structured with a specific agenda and followed by detailed notes summarizing concerns, questions, action steps, and items for follow-up.
- Following the initial kick-off meeting, MGT will begin developing agendas and materials for all subsequent planning iterations. Feedback loops will be structured and specific to ensure that the MDE team and stakeholders have opportunities to share their priorities and experiences, and ample opportunity to evaluate the effectiveness of strategic planning sessions.

The next section offers a detailed sequence of the two-phased approach we propose for developing the strategic plan. On the next page is a visual representation of when deliverables can be expected. On the following page is a table that previews the structure and content the MDE can expect from the final project deliverables, and further detail on committee formation and stakeholder engagement.

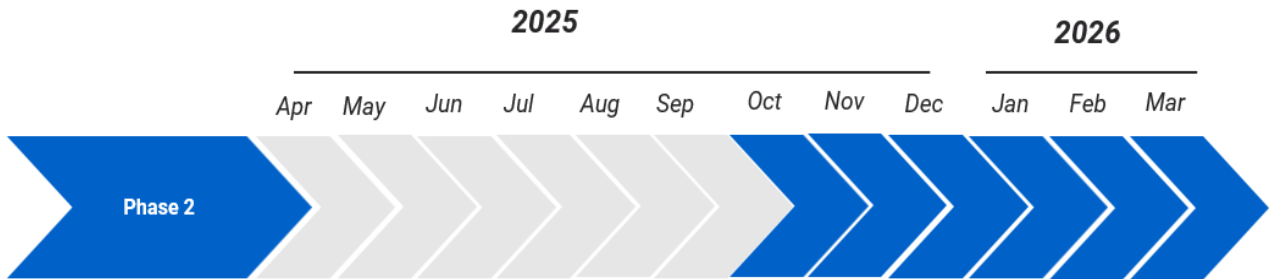
TWO-PHASE TIMELINES



Months



Exhibit 1. Phase 1: Organizational Assessment and Strategic Plan Co-Design



Months

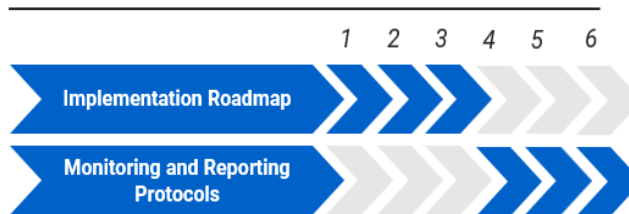


Exhibit 2. Phase 2: Implementation Planning and Support

DELIVERABLES

Phase	Deliverables
Phase 1: Organizational Assessment and Strategic Plan Co-Design (Deadline: October 1, 2025)	<ul style="list-style-type: none"> ▪ Project Work Plan ▪ Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis and Environmental Scan Report ▪ Stakeholder Engagement Plan ▪ Draft Strategic Plan and Performance Scorecard ▪ Final Strategic Plan and Performance Scorecard ▪ Final Presentation and Training by October 1, 2025
Phase 2: Implementation Planning and Support (Deadline: April 1, 2026)	<ul style="list-style-type: none"> ▪ Robust implementation roadmap encompassing all prioritized strategic initiatives ▪ Organizational governance and process improvement recommendations ▪ Monitoring and Reporting Protocols ▪ Communication and collaboration plans to support change management for all stakeholders

STAKEHOLDER COLLABORATION

To ensure the successful and timely completion of all project deliverables, MGT takes a proactive approach to project management. This includes working sessions with the client as needed, as well as regular reporting and collaboration. Our philosophy is to continually refine outputs and deliverables to ensure project deliverables meet client expectations and prove to be extremely valuable inputs to strategic decision making.

MGT proposes weekly planning meetings with MDE leadership across Phase 1 to ensure project initiation is on track and finalize a meeting cadence going into Phase 2. MGT will draft agendas with MDE leadership, support thought partnership, collect comprehensive notes, and share these from each engagement. Dates will be determined together with MDE leadership, prioritizing team member availability as the driver of when meetings occur.

The process described reflects a deliberate and timely engagement of stakeholders, implementers, and decisionmakers. We believe the approach described will accommodate the objectives, and ensure the right data are aggregated and analyzed to provide MDE leaders with a data-informed strategic plan. This collaborative, inclusive process is a hallmark of our approach. To ensure there are appropriate opportunities for engagement from relevant stakeholders, we recommend the development of a few teams to meet regularly with MGT to review ongoing project activities and needs, research design and instruments, preliminary insights, and deliverable development.

- **Steering Committee** – This group will provide strategic guidance for conducting the work, prepare recommendations for the larger community, align on key decisions, and build commitment to the goals. The Steering Committee of 3-5 people will meet several times during this engagement.
- **Sub-committees** – These groups will be established by the Steering Committee to execute specific initiatives. Each sub-committee group will include 1-3 district and/or campus leaders who will be closely involved throughout the process, meeting every 1-2 weeks to discuss initiative plans, review insights, and identify next steps.

In addition to the establishment of the teams above, MGT suggests inviting community stakeholders – including students, parents, and staff – to participate in focus groups sessions.

COMPONENT 1 – PLAN OF ACTION

We will schedule review periods for students, family members, and community leaders to offer their perspective and guidance. We are especially impressed by the student who has an active voting role on the MDE State Board of Education and therefore would consider student representation as part of this process to be vital to establishing equitable systems. We believe in the importance of doing this work with the stakeholders who will be impacted the most by the decisions that appear in the final iteration of the five-year strategic plan.

EFFICIENT SEQUENCE OF ACTIVITIES AND TASKS

MGT proposes to complete all project activities in a **2-phased approach** as detailed below, with **one year** of support from project start to finish. Across all phases, MGT will be available to provide progress updates to the board, administration, and other stakeholders as needed.

PHASE 1: ORGANIZATIONAL ASSESSMENT AND STRATEGIC PLAN CO-DESIGN

Timeline: 6 months

Objectives – Phase 1:

- Work with MDE leadership team to clarify the goals and desired outcomes for the strategic plan.
- Develop a detailed work plan and collaborative process for the planning effort, including identifying key stakeholders.
- Assess the current state of MDE operations and capabilities.
- Formulate strategies and initiatives to address high-priority needs and opportunities with accompanying key performance indicators (KPIs).
- Create a performance scorecard to monitor progress toward strategic goal achievement.
- Engage stakeholders through workshops to provide strategic guidance and garner continuous feedback.

Key Actions – Phase 1.1: Launch & Engagement

- Hold a kick-off meeting with MGT team members and key State Board of Education (SBE) and Board Designees to refine workplans, finalize our approach, define internal and external stakeholder interviewees, and align on desired outcomes for Phase 1 and beyond.
- Develop a detailed list of questions the strategic plan will answer (detailing the scope of the engagement) and create a robust work plan to answer these questions.
 - Identify initial data metrics and indicators of interest to MDE leaders and stakeholders and begin data sharing agreements and collection of relevant data.
- Specify which schools and stakeholders will be included in our primary and secondary research and how that research will be conducted.
- Review in more detail all relevant documents such as current and historic strategic planning documents, program descriptions, budgets, fundraising artifacts, annual reports, and other organizational artifacts that provide insight into current state operations.
- Determine the members and meeting cadence of the Steering Committee and relevant Sub-Committees.

COMPONENT 1 – PLAN OF ACTION

- Conduct standardized diagnostic interviews with MDE team members and key stakeholder groups (e.g., students, staff, parents, Board, community) and document/synthesize findings with regards to current state of:
 - Academic systems and priorities.
 - Relationships and socioemotional connection points.
 - Fidelity of equity systems, including restorative practices.
 - Staff recruitment, hiring, and retention.
 - Communications and family/community engagement.
 - Central office systems, structures, and accountability.
 - Other topics as needed.
- Assess capabilities and capacity within the MDE to achieve its desired impact.

Key Actions – Phase 1.2: Benchmarking & Review

- Support and facilitate community and stakeholder engagement, including with the MDE team, school and MDE staff, community members, and members of the board.
- Provide strategic guidance to MDE leaders on engagement.
- As needed, provide ad hoc material creation and support for public sessions or board meetings.
- Provide summaries of progress for board and administrative updates.
- Conduct data analysis and synthesis on key metrics such as school and student performance, enrollment, teacher characteristics, operations, and other indicators to be decided in collaboration with the MDE project team.
- Analyze any culture data analysis via staff, student, parent, and community surveys and/or focus groups on key metrics.
- Conduct a review of best practices in strategic planning.
- Identify key challenges districts and organizations face in developing and implementing strategic plans, as well as potential solutions/approaches for mitigating those challenges, which could include internal change management and divisional alignment, community engagement and buy-in, among others.
- As needed, conduct targeted interviews with local educators or campus leaders to understand priority initiatives and/or on-the-ground conditions and opportunities.
- Research peer districts, identifying critical information such as their strategic plans, organizational structure, key data metrics, and operational structures to develop data-informed considerations for the MDE's strategic plan.
- Conduct desk research around issues related to emerging strategic priorities.
- Analyze and report on all qualitative and quantitative data gathered from key audiences, with the intent of uncovering the MDE's value proposition for potential new audiences.
- Conduct a capabilities review to determine whether and where capacity exists to pursue the potential strategic options.

COMPONENT 1 – PLAN OF ACTION

- Use available data and insights gathered to develop a set of recommended strategic goals and opportunities rooted in diagnostic conversations and analysis.

Key Actions – Phase 1.3: Co-Design

- Establish any additional needed cross-functional subcommittees of core MDE leaders and stakeholders (broader than the steering committee) who will be essential to co-designing strategic priorities and implementation planning, including representatives from academics, operations (e.g., facilities and financing), talent, and external communications.
- Plan and facilitate a series of collaborative design sessions with these sub-committees, with potential topics including:
 - Share and discuss findings from Phases 1.1 and 1.2, including socialization of strategic recommendations.
 - Aligning on the MDE’s mission and vision, backwards mapped from the profile of a Mississippi Department of Education graduate.
 - Operationalizing strategic priorities, including identification of budget and comms implications aligned to programmatic initiatives, cross-functional needs and barriers, and implementation milestones.
- Work closely and iteratively with the Steering Committee and sub-committees to develop a detailed strategic plan, including the following key elements:
 - Executive summary.
 - Mission and vision.
 - Near- and long-term objectives/strategic priorities.
 - Key initiatives and rationale behind each priority.
 - Milestones and achievements to date.
 - Performance measures.
- In partnership with the Steering Committee and sub-committees, create a performance scorecard that visually tracks progress toward strategic goals, including the following key elements:
 - Measurable KPIs for each strategic goal, aligned to the mission
 - Metrics, targets, timelines, and responsibilities for reporting and monitoring
 - Work with data teams to develop ongoing data collection to measure progress against all goals and track KPIs.

Key Actions – Phase 1.4: Socialize Plan

- Prepare and present the final strategic plan and performance scorecard to the MDE Board for approval.
- Provide electronic and print copies of strategic plan and performance scorecard.
- Conduct a training session for staff on use of performance scorecard to ensure proper and consistent implementation.

Phase 1 Deliverables:

- Project Work Plan
- SWOT Analysis and Environmental Scan Report
- Stakeholder Engagement Plan
- Draft Strategic Plan and Performance Scorecard, including:
- Set of strategic recommendations and emerging hypotheses on district goals and priorities.
- Comprehensive set of findings from landscape review and research with suggested application to the MDE's mission and work.
- Benchmarking tables providing interactive, side by side comparisons of the MDE and peer districts.
- Descriptions of a range of strategic options for the MDE, including anticipated impact and feasibility (e.g., estimates of difficulty, resource requirements).
- As needed, data visualizations and analysis to support MDE leaders' understanding of key issues.
- Final Strategic Plan and Performance Scorecard, including:
- Strategic plan with mission, vision, priorities, objectives, initiatives, milestones, and metrics. The report will be supported with details that include:
- Insights from key stakeholders and secondary sources.
- Recommendations for next steps.
- Executive summary for public distribution and key stakeholders.
- Suggested metrics for tracking implementation.
- Final Presentation and Training by October 1, 2025

PHASE 2: IMPLEMENTATION PLANNING AND SUPPORT

Timeline: 6 months

Objectives – Phase 2:

- Design detailed implementation plans to execute on MDE's prioritized initiatives and successfully deliver on its ambitious strategic plan.
- Assist leaders in strategic execution and implementation of initiatives that are aligned to strategic priorities.
- Assist leaders with key work product creation and related support to engage key stakeholders to ensure effective implementation of proposed strategy.
- Establish clear success criteria aligned to goals and intended outcomes to ensure effective and appropriate evaluation reporting.

Key Actions – Phase 2:

- Develop robust implementation plans for each prioritized initiative in collaboration with district leaders that include defined workstreams, activities, milestones, and cross-functional decision points / implications.

COMPONENT 1 – PLAN OF ACTION

- Identify project owners, leads, and support teams by creating RACI charts to ensure alignment around roles and responsibilities.
- Develop and establish strong organizational and team governance structures and implement process improvement as opportunities are identified for all prioritized initiatives in the strategic plan.
- Draft and design a communications and collaboration plan to ensure smooth change management processes and enable robust, cross-functional coordination to deliver on goals, including creating tools for tracking KPIs and reporting results to stakeholders.

Deliverables – Phase 2:

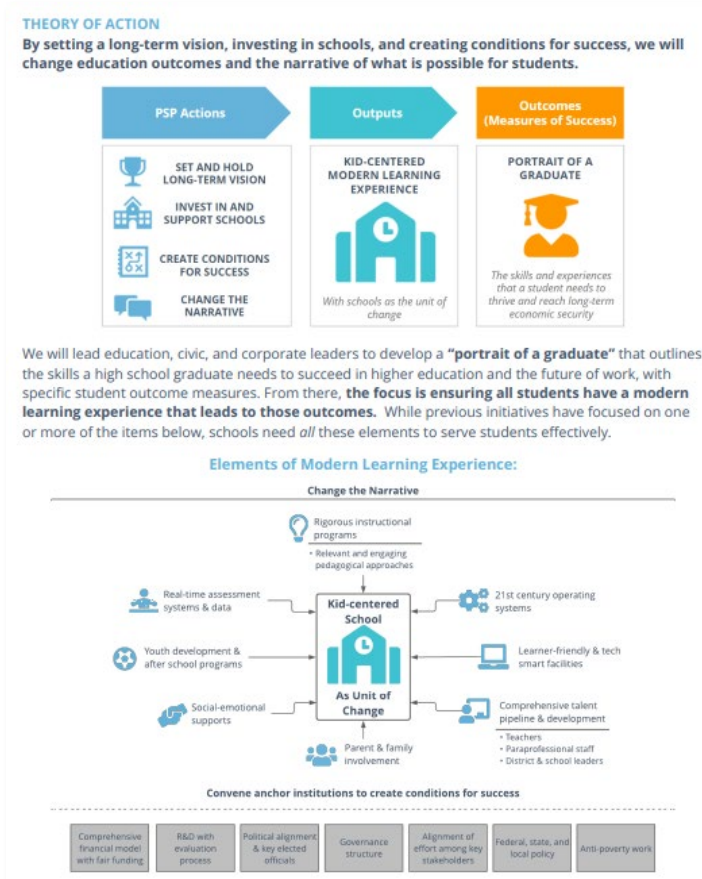
- Robust implementation roadmap and monitoring plan encompassing all prioritized strategic initiatives in electronic and print formats
- Organizational governance and process improvement recommendations
- Communication and collaboration plans to support change management for all stakeholders

SAMPLE WORK PRODUCTS

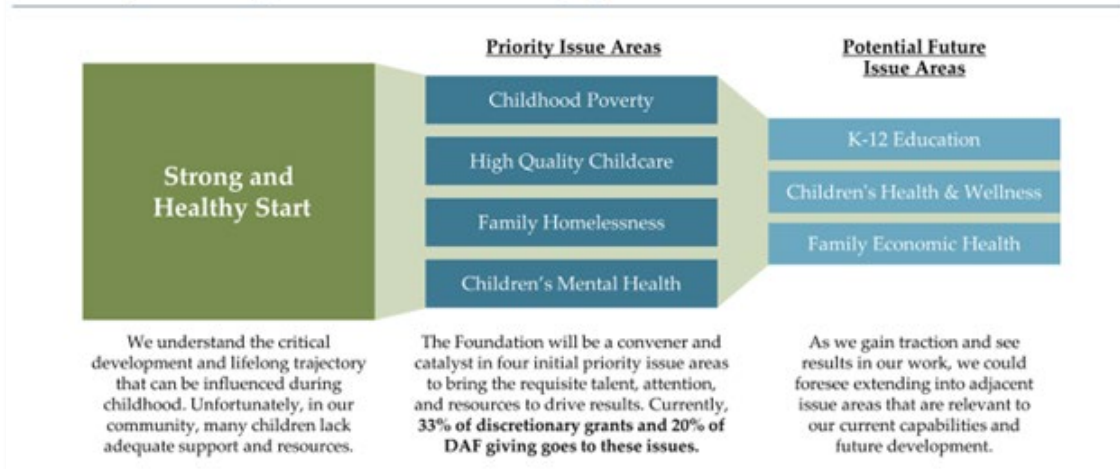
The following are sample screenshots of key strategic planning deliverables we have provided for clients in recent engagements. For an example of a full strategic plan we helped develop, please visit [Aldine ISD: A New Way Forward](#) at strategicplan.aldineisd.org/.

COMPONENT 1 – PLAN OF ACTION

THEORY OF ACTION & IMPLEMENTATION PLANNING

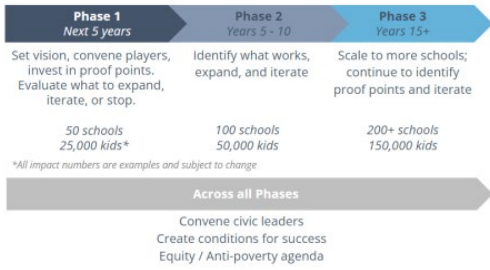


Although we serve all donors and many issues, [Client’s] focus on driving impact will be framed by our Strong and Healthy Start initiative and underlying issue areas.



SYNTHESIS & STRATEGIC RECOMMENDATIONS

We see a continuum of change, with work in the next 5 years building toward greater scale over the next 15+ years:



We will take action in four areas to move schools toward a modern learning experience:



More detail on the actions and outcomes we will undertake in each area is below.

Function	Actions	Outcomes <i>Specific targets TBD</i>
Set and Hold Long-Term Vision Convene and lead players around a portrait of a graduate and vision for a modern learning experience , and hold continuity through political transition.	<i>Immediate (3-6 months)</i> - Lead citywide process to develop: - Portrait of a graduate - Measures of success - Vision for modern learning experience with inputs that will lead to measures of success <i>1-year</i> - Engage political, education and community leaders to sign on to vision and common goals, and agree	<i>Immediate</i> - Portrait of a graduate, measures of success, and vision for modern learning are set <i>1-year</i> - Key players are committed to shared vision and goals, and their role in achieving

▶ THE PLAN FORWARD

SYSTEM OF GREAT SCHOOLS

The System of Great Schools framework is a unifying theory of action that knits together our priorities and actions. It is a way for us to see the whole, rather than think about our work in silos. This framework will serve as our foundation to increase the number of top-rated schools in the district.

We will manage school performance by systematically reviewing our schools throughout the year and determining which strategies to use to improve or maintain performance.

The creation of schools should not be arbitrary. Rather, we will expand options to meet the needs of all students, focusing on high-quality and innovative school models based on feedback from students and families as well as the district's needs and access to resources.

Additionally, we will be intentional about increasing access to these new learning options by providing timely and transparent information directly to families.

New systems and processes will be developed to increase the district's ability and capacity to maintain a system of great schools.

ANCHOR GOALS

Every Aalene student deserves a high-quality education. These goals will ensure we provide a rigorous and enriching educational experience that prepares every student for success in college, career, and life.

- All students will learn in highly rated schools.
- All rising first-graders will enter school-ready.
- All third-graders will read on or above grade level.
- All eighth-graders will perform math on or above grade level.
- All students will graduate college and career ready.



6.1 Updated August 2019

1. Executive Summary

MGT was hired by Gwinnett County Public Schools (GCPS) Superintendent, Dr. Calvin J. Watts, to conduct a high-level, organizational effectiveness review of the District. Dr. Watts came to GCPS in July 2021, succeeding a superintendent that had been in office over two decades.

For the purpose of improving operational efficiencies and effectiveness within the Gwinnett County Public Schools organization, this review specifically focused on the organizational structure of the central office at the executive level and the administrative offices of select organizational units, as identified through the initial review. The consultant team was charged with conducting interviews with a wide range of individuals in leadership positions, including employees who do not report directly to Dr. Watts. The consultant team was asked to identify changes that would increase the effectiveness of district leadership to advance the goal of increasing support directly to schools.

Over the course of three months, the consulting team conducted approximately 50 in-depth onsite interviews with key leadership positions, strategic reviews of organizational charts and job descriptions, and deep dives of key District divisions and departments. In addition, a thorough demographic study of the data and trends within Gwinnett County was reviewed and analyzed. In-depth research was also employed to identify best practices in K-12 education, as well as organizational design. Finally, the MGT team relied on its deep experience working with large, complex districts and organizations across the United States.

The following report includes a full assessment of the inputs and data gathered to provide Gwinnett County Public Schools with findings, recommendations, and accompanying rationales to better achieve organizational effectiveness across the following district functions:

- Executive District Leadership
- Diversity, Equity, and Inclusion
- Human Resources
- Information Technology
- Business Operation

6. Executive District Leadership

Finding #1

District leadership is understandably proud of its many accomplishments, having managed the large student population growth over a short period of time. However, the large number of employees at the executive leadership level is unsustainable.

Recommendation #1: Reduce the number of direct reports to the Superintendent

Rationale #1

As the Chief Executive Officer of a large, complex, multi-billion-dollar organization, the Superintendent of GCPS must have a small, aligned, coherent team he can rely on for day-to-day and strategic leadership of the District. Currently, functional areas are split and there are high-level direct reports with zero to a handful of employees on their teams. This diluted leadership structure is costly, inefficient, ineffective, and moreover, a threat to the sustainability and responsiveness of the District.

Finding #2

The current District senior leadership structure, in addition to being extremely large, is decentralized, redundant, misaligned, and disjointed.

Recommendation #2: Reorganize the structure of GCPS leadership into nine new functional units with Chiefs reporting directly to the Superintendent

Rationale #2

This new structure, including the addition of an Executive Administrative Assistant, will create increased transparency, streamline District operations, and most importantly will establish clear lines of accountability. This new organizational structure increases the Superintendent's bandwidth to refocus time on strategic issues in place of dozens of direct report meetings. Additionally, this structure makes it easier for the Superintendent to quickly and effectively receive and relay information throughout the organization.

MISSION & VISION

OUR VISION
All Aldine ISD students will receive a dynamic and unparalleled education that guarantees choices and opportunities today and in the future.

OUR MISSION
Aldine ISD will provide a rigorous and enriching educational experience that prepares every student for success in college, career, and life.

What Does Success Look Like in Midland?



Focus on Growing and Supporting High Quality Schools

Cultivate existing MISD educators and connect with external partners to deliver the best possible educational options for our kids.



Focus on Talent

Recruit, develop, and retain high quality talent at all levels, from teachers to school and district leadership.



Invest in, and Build 21st Century Facilities

Conduct a bond campaign to support the development of 21st century learning environments to meet the growth of our community.



COMPONENT 2 – ADMINISTRATION

The success of this engagement depends on the qualifications of the project team and the way in which it is structured and managed.

STAFFING PLAN

MGT’s team is comprised of educators with extensive expertise in K-12 education and management consulting. We leverage our collective experience and expertise to ensure our clients receive the highest quality support for strategic planning and benefit from our extensive experience with school districts. The MGT team will be led by Collin Moore, with support from additional team members identified below. Each leader has extensive experience with K-12 strategic planning and implementation.

We are school people helping school people.

We have been thoughtful in considering both the structure of organizational staffing as well as the individuals from our robust team that will be best positioned to meet, if not exceed, the requirements of this partnership with the MDE. We propose a team of educators who bring subject matter expertise, deep knowledge of strategic planning, and Mississippi specific knowledge.

Subject Matter Experts	Similar Experiences and Roles Assigned
Collin Moore	<ul style="list-style-type: none"> Specializes in policy design, implementation, change management, and execution of large-scale initiatives for non-profits, cities, districts, and states Background in law, policy, and education J.D., New York University School of Law, New York, NY Worked closely with leaders in state and local education agencies
Samantha (López) Arrona	<ul style="list-style-type: none"> Background in education policy and leadership. Specializes in supporting state agencies and school districts to drastically improve outcomes for their most vulnerable student populations. M.P.P., Rackham Merit Fellow, University of Michigan, Gerald R. Ford School of Public Policy. Founding Policy and Research Manager at JerseyCAN.
Jamie VanDeWalle	<ul style="list-style-type: none"> Over two decades of experience in the field of public education, from the classroom to the non-profit sector and district-level administration. Served as Chief Portfolio Officer for Indianapolis Public Schools (IPS), where she was instrumental in co-founding the office responsible for the strategic growth of the Innovation Network, a pivotal initiative that redefined educational excellence in the district.

Tab 2 – Resume(s) for Key Personnel



Collin Moore
Senior Vice President



Collin Moore specializes in policy design, implementation, change management, and execution of large-scale initiatives for cities, districts, and states. Collin's background is in law, policy, and education. He has worked closely with leaders in state and local education agencies.

Collin is committed to transforming the public education delivery system to provide exciting, enriching, and innovative options for all students.

Areas of Expertise

- State Legislation Drafting and Collaboration
- Policy Brief, Speech, and Press Release Drafting
- Legislative Budgeting
- Personnel, Legislator, and Union Leadership Collaboration
- Communications
- High-Level Scheduling
- Performance Metrics

Education

- J.D., New York University School of Law

Selected Project Highlights

<p>MGT <i>Urban School District Educational Quality Improvement High-Leverage Initiatives: Performance Management Systems, Tiered School Intervention, Unified Enrollment, and School Facilities Management; Central Office Reform Initiatives: Strategic Reorganizations, Use of Data, and Financial Analysis; District and Non-Profit Strategic Planning Initiatives</i></p>	<p>Center for Public Research and Leadership <i>Columbia Law Education Policy Clinic Consultant While Studying at NYU Law; Performance Metrics and Measurement Tool Development</i></p> <p>Connecticut DOE <i>Biennial Legislative Budget Guidance; Legislative Bill Drafting; Commissioner’s Office Interdepartmental Liaison</i></p>
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Work Experience

MGT Impact Solutions, LLC, Vice President, 2022-Present; Principal, 2014-2022

Center for Public Research and Leadership, Student Consultant, 2013-2014

Connecticut State Department of Education, Special Assistant to the Commissioner, 2012-2013



Samantha (López) Arrona
Senior Vice President

Samantha (López) Arrona, a Vice President at MGT, brings a wealth of experience in large-scale project management and strategic execution to her role. With a background in education policy and leadership, Samantha specializes in supporting state agencies and school districts in drastically improving outcomes for their most vulnerable student populations. Prior to her current role, she served as the Executive Director of Family Support for Newark Public Schools, where she managed initiatives to assist students and families with enrollment-related issues. Samantha's dedication to improving educational access and outcomes is underscored by her previous roles as a classroom teacher and as a founding Policy and Research Manager at JerseyCAN. She holds a master's in public policy from the University of Michigan and a Bachelor of Arts in Political Science and Latin American Studies from the University of Pennsylvania.

Areas of Expertise

- Large-scale Project Management
- Strategic Execution Support
- Education Policy Development and Implementation
- Student Enrollment and Family Support Services
- Qualitative and Quantitative Analysis
- Community Engagement and Advocacy
- Salesforce Administration (Intermediate)
- Spanish - Speaking (Fluent)

Education

- M.P.P., Rackham Merit Fellow, University of Michigan, Gerald R. Ford School of Public Policy
- B.A., Political Science and Latin American Studies, University of Pennsylvania

Work Experience

MGT Impact Solutions, LLC, Vice President, 2022-Present; Director, 2018-2022

Newark Public Schools, Planning Enrollment Research & Family Support (PERFS), Executive Director of Family Support, 2017-2018

Newark Public Schools, Director of School and Family Support for Enrollment, 2015-2017

Newark Public Schools, Director of Special Projects, 2015

Newark Public Schools, JerseyCAN, Founding Policy and Research Manager, 2013-2014

Teach for America, Education Pioneer Fellow, 2012-2012



Jamie VanDeWalle
Vice President

Jamie VanDeWalle brings over two decades of dedicated experience to the field of public education, showcasing a diverse career that spans the classroom, non-profit sector, and district-level administration. Her commitment to equitable educational opportunities is evident in her impressive track record, which includes serving as Chief Portfolio Officer for Indianapolis Public Schools (IPS). There, Jamie was instrumental in co-founding the office responsible for the strategic growth of the Innovation Network, a pivotal initiative that redefined educational excellence in the district. Her prior roles include founding the HR Department at KIPP Delta Public Schools, directing special projects for Teach For America – Delta, and teaching elementary students in rural Arkansas, each position highlighting her unwavering dedication to educational reform and systemic improvement.

At MGT, Jamie continues to advance her mission of system-level change by providing direct executive support to clients like Superintendent Dr. Lupita Hinojosa of Spring ISD. Her involvement in the district's engagement with the System of Great Schools (SGS) network underscores her passion for creating impactful educational environments. Jamie's extensive background, from grassroots educational roles to high-level strategic leadership, positions her as a dynamic force in shaping the future of public education and ensuring that every student has access to the opportunities they deserve.

Areas of Expertise

- Educational Leadership and Administration
- System-Level Change and Innovation
- Human Resources and Organizational Development
- Strategic Planning and Implementation
- Educational Equity and Access
- Classroom Instruction and Curriculum Development

Education

- B.A., Anthropology and Communications/Culture, Indiana University

Work Experience

MGT Impact Solutions, LLC, Director, 2023-Present

Indianapolis Public Schools, Chief Portfolio Officer, 2019-2022;
Portfolio Officer, 2018-2019; Director of Innovation Strategy,
2016-2018; Innovation Manager, 2016

KIPP Delta Public Schools, Talent and HR Consultant, 2015-2016;
Director, Talent & Human Resources, 2013-2015

Appendix C - References

Client Name	Knox County Public Schools
Contact Name and Title	Kori Lautner, Assistant Superintendent of Strategy
Contact Address	400 W. Summit Hill Drive Knoxville, TN 37902
Contact Telephone Number	(931)320-1701
Email Address	kori.lautner@knoxschools.org
Type of work provided to the client	District Strategic Planning
Effective contract dates for the time frame services were/are being provided to client	2022-2024

Client Name	Joe Siedlecki
Contact Name and Title	Chief Growth and Impact Officer, Amira (former Associate Commissioner of School Improvement, Innovation and Charter Schools at the Texas Education Agency)
Contact Address	5214F Diamond Heights Blvd, Suite 3255 San Francisco, CA 94131
Contact Telephone Number	(512) 415-5341
Email Address	joe.siedlecki@amiralearning.com
Type of work provided to the client	TEA System of Great Schools Implementation
Effective contract dates for the time frame services were/are being provided to client	2020-2023

Client Name	Educate Texas
Contact Name and Title	Kerri Briggs, Executive Director (former HISD Chief of Staff)
Contact Address	5500 Caruth Haven Lane, Dallas, Texas 75225
Contact Telephone Number	(214)750-4222
Email Address	Kbriggs@cftexas.org
Type of work provided to the client	District Strategic Planning
Effective contract dates for the time frame services were/are being provided to client	2021-Present

Appendix C - References

Client Name	Aldine Independent School District
Contact Name and Title	Dr. LaTonya Goffney, Superintendent
Contact Address	2520 W.W. Thorne Drive, Houston TX 77072
Contact Telephone Number	(281) 449.1011
Email Address	lgoffney@aldineisd.org
Type of work provided to the client	District Strategic Planning
Effective contract dates for the time frame services were/are being provided to client	2019 - Present

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	

Client Name	
Contact Name and Title	
Contact Address	
Contact Telephone Number	
Email Address	
Type of work provided to the client	
Effective contract dates for the time frame services were/are being provided to client	



COMPONENT 3 – PRICE

*Defined by Impact. Driven by People.
Dedicated to the Community.*

Our cost proposal reflects our interpretation of the written requirements within your solicitation. With that understanding, we believe a scope clarification discussion during Project Initiation would allow us to confirm our understanding of your requirements and exchange ideas on how to manage the cost of this program. **We take pride in customizing our client’s needs – and we will work with you to ensure our fees are aligned with your expectations and budget.**

Tab 4 – Price/Budget

Deliverable	Projected Timeline	Cost
Project Work Plan	1-month mark (~May 2025)	\$17,088
SWOT Analysis & Environmental Scan Report	2-month mark (~June 2025)	\$51,264
Stakeholder Engagement Report	3-month mark (~July 2025)	\$34,177
Draft Strategic Plan & Performance Scorecard	5-month mark (~September 2025)	\$68,354
Final Strategic Plan & Performance Scorecard	6-month mark (~Oct 2025)	\$68,354
Final Presentation & Training	6-month mark (by Oct. 1, 2025)	\$34,177
Implementation Roadmap	9-month mark (~Jan 2026)	\$34,177
Monitoring & Reporting Protocols	12-month mark (~April 2026)	\$34,177
		Total: \$341,768

The City’s Appendix I – Cost Data/Budget form is on the next page.

Appendix I – COST DATA/BUDGET

The vendor should refer to [Section 2.3 Deliverables](#) and provide line-item cost detail for all deliverables identified.

Attach Excel spreadsheet if necessary.

See MGT's attached Excel Spreadsheet for Cost deliverable.



COMPONENT 4 – OTHER

Tab 5: List of all K-12 clients

Alabama	
Baldwin County Public Schools	Mobile Public Schools
Huntsville City Schools	
Alaska	
Fairbanks North Star Borough School District	Lower Kuskokwim School District
Arizona	
Arizona Joint Committee on Capital Review	Phoenix Union High School District
Arizona State Schools for the Deaf and Blind	Washington Elementary School District
Mesa Public Schools	
Arkansas	
Arkansas Department of Education	University of Arkansas, Little Rock
Little Rock Alliance for our Public Schools	
California	
Alameda County Office of Education	Imperial County Office of Education
Bonsall Union Elementary School District	Los Angeles Unified School District
California Children and Families Commission	Lozano Smith, LLP
California Department of Education	Marin County Office of Education
California Institute for Human Services	National City Public Library
California School Information Services	Sacramento City Unified School District
City of Santa Fe Springs	San Diego Unified School District
CompassLearning	San Francisco Unified School District
Compton Unified School District	Santa Clara County Education Office
Escuela Popular Charter School	State of California School Districts
Fiscal Crisis Management and Assistance Team	Sweetwater Union High School District
Fremont Unified School District	West Contra Costa Unified School District
Fresno Unified School District	
Colorado	
Aurora School District	Jefferson County
Boulder Valley Public Schools	Jefferson County School District
Donnell-Kay Foundation	State of Colorado Department of Education
Connecticut	
American School for the Deaf	Greenwich Public Schools
Fairfield Public Schools	Stamford Public Schools
Florida	
Alachua County Schools	Foundation for Excellence in Education, Inc.
Brevard County School District	Gadsden County School District
Charlotte County School District	Gulf Coast Community Foundation (On Behalf of Sarasota County Schools)
Charter School USA	Hamilton County School District
Citrus County School District	Hillsborough County School District
Clewiston High School	Hillsborough County Teachers Association
DeSoto County School District	Jackson County School District
Duval County School District	Lake County School District
Early Learning Coalition of Palm Beach	Leon County School District
Economic Council of Palm Beach	Madison County School District
Escambia County School District	Martin County School District
Florida Chamber Foundation	Moore Haven Junior/Senior High School
Florida Children's Forum	Okaloosa County School District
Florida Department of Education	Palm Beach County School District
Florida Division of Community Colleges	

COMPONENT 4 – OTHER

Florida Education Association-United	Panhandle Area Educational Consortium
Florida Educational Technology Corporation	Pinellas County School District
Florida Heartland Educational Consortium	Polk County School District
Florida Learning Alliance	Public Employees Services Company
Florida Office of Program Policy Analysis and Government Accountability	School Readiness Coalition of Bay and Jackson County
Florida Partnership for School Readiness	Siver Insurance Management Consultants
Florida School for the Deaf and Blind	Technological Research and Development Authority
Florida State Board of Education	Union County School District
Florida State University	University of South Florida
Florida Teaching Profession-National Education Association	Volusia County School District
Florida Virtual School	Washington County Schools

Georgia

Atlanta Public Schools	Gwinnett County School District
Clarke County School District	Fulton County School District
DeKalb County School District	Henry County School District
Georgia Board of Education	State of Georgia
Georgia Department of Education	Troup County School District

Hawaii

Hawaii Department of Education

Idaho

Architects West, Inc.	J.A. and Katheryn Albertson Foundation
Bigfork School District	Kittitas School District
Boise School District	Lake Pend Oreille School District
Davenport School District	Lombard-Conrad Architects
Echo School District	Medical Lake School District
Grangeville School District	Moscow School District
Idaho Office of Attorney General	Richfield School District
Idaho School Boards Association	Sisters School District
Idaho Statewide School Facilities Needs Assessment Commission	Wahluke School District

Illinois

Carbondale Community High School #165	Illinois State Board of Education
Carbondale Elementary School #85	Learning Point Associates
Chicago Public Schools	Meridian School District #15
Community 155 High Schools	Oak Park Elementary District 97
Dallas City School District #327	Pinckneyville District 50
Edgar County School District #6	Rockford Board of Education
Illinois Mathematics and Science Academy	Spring Garden School District #178

Indiana

Evanston-Skokie School District	Indianapolis Public Schools
Evansville-Vanderburgh School Corporation	Lebanon County School Corporation
Fort Wayne Community Schools	Monroe County Community School Corporation
Gary Community School Corporation (IN DUAB)	

Kansas

Topeka Public Schools

Kentucky

Kentucky Department of Education	Kenton County Schools
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Louisiana

Caddo Parish Public Schools	Louisiana Systemic Initiatives Project
Jefferson Parish Public School System	Private Citizens' Commission
Louisiana Department of Education	

Maryland

Anne Arundel County Public Schools	Maryland Department of Education
Baltimore County Public Schools	Montgomery County Public Schools

COMPONENT 4 – OTHER

Carroll County Public Schools
 Harford County Public Schools
 Maryland Attorney General
 Maryland Coalition for Inclusive Education

Prince George's County Public Schools
 St. Mary's Public Schools
 Western Maryland Education Consortium

Massachusetts

Boston Public Schools
 Brookline Public Schools

Massachusetts Department of Education
 Town of Andover

Michigan

Benton Harbor Area Schools
 Michigan Department of Education

Michigan Governor's Transition Team for Detroit Public Schools
 State of Michigan

Minnesota

Edina Public Schools

Minnesota Department of Children, Families and Learning

Mississippi

Jackson Public Schools

Mississippi Department of Education

Missouri

Ferguson-Florissant School District
 Hickman Mills Public Schools
 Kansas City Public Schools
 Lindbergh Public Schools

Springfield Public Schools
 St. Louis Public Schools
 Wentzville School District

Montana

Montana Department of Administration
 Ronan-Pablo School District
 State of Montana

Whitefish School District
 Lincoln Public Schools

Nebraska

Nebraska Department of Education

Nevada

Douglas County School District
 Elko County School District

Lyon County School District
 Nevada Department of Education

New Hampshire

Manchester School District

New Jersey

Camden City Public Schools
 New Jersey Department of Education
 New Jersey Department of the Treasury

Newark Public Schools
 State of New Jersey

New Mexico

New Mexico Department of Public Education

New York

New York State Education Department
 New York State Special Commission on Education

Rochester School District

North Carolina

Alexander County School System
 Asheville City Schools
 Bertie County Board of Commissioners
 Burke County School District
 Carteret County Schools
 Chapel Hill-Carrboro Schools
 Cleveland County School District
 Gaston County School District
 Guilford County School District
 Halifax County School District
 Haywood County School District
 Henderson County School District

Iredell-Salisbury County School District
 Lenoir County School District
 Johnston County Schools
 MetaMetrics, Inc.
 North Carolina General Legislative Services Commission
 Paul R Brown
 Richmond County School District
 Stanly County School District
 Union County Board of Commissioners
 Wake County Public School System
 Wayne County School District

North Dakota

Fort Yates School District
 Mandaree School District

Minnewaukan School District
 North Dakota Department of Public Instruction

COMPONENT 4 – OTHER

Ohio

Akron Public Schools	Ohio Board of Regents
Canton City Schools Board of Education	Ohio Department of Education
Cleveland Public Schools	Summit County Educational Service Center
Dayton Public Schools	

Oklahoma

Francis Tuttle Technology Center	Oklahoma State Regents for Higher Education
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Oregon

Eugene School District	North Bend School District
PLO Associates	Sandy Union High School District
Portland Public Schools	

Pennsylvania

Bethlehem School District	Pennsylvania Legislative Budget and Finance Committee
Connellsville School District	Philadelphia School District
Hazleton School District	Pittsburgh Public Schools
Mifflin County School District	Uniontown Area Schools
Pennsylvania Department of Education	

Rhode Island

Johnston County Schools	Town Council of Hopkinton
Pawtucket School District	Town Council of Richmond
Town Council of Charlestown	Town of Johnston

South Carolina

Aiken County Public Schools	Oconee County Public Schools
Anderson County School District Five	Richland County School District One
Beaufort County Schools	Savannah-Chatham County Schools
Charleston Public Schools	South Carolina Department of Education
EIA Select Committee of the South Carolina General Assembly	State of South Carolina
	TetraData

South Dakota

Rapid City Area Schools	
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Tennessee

Bristol Tennessee City Schools	Metro Nashville Public Schools
City of Bristol	Metropolitan Government of Nashville and Davidson County
Collierville Schools	Shelby County Schools
Hamilton County Schools	Tennessee Department of Education
Memphis City Schools	

Texas

Abilene Independent School District	McAllen Independent School District
Alamo Heights Independent School District	Mercedes Independent School District
Aransas Pass Independent School District	Meridian World School
Austin Independent School District	Michael and Susan Dell Foundation
Bandera Independent School District	Midland Independent School District
Beacon Hill Preparatory Academy	Navarro Independent School District
Beaumont Independent School District	Region IV Education Service Center
Buena Vista Independent School District	Rio Hondo Independent School District
Burleson Independent School District	Rockwall Independent School District
Caldwell Independent School District	Seguin Independent School District
Camden-Corrigan Independent School District	Sherman Independent School District
Channelview Independent School District	Sinton Independent School District
Cleveland Independent School District	Somerville Independent School District
Corsicana Independent School District	Southwest Independent School District
Dallas Independent School District	Spring Independent School District
Dell Computers	Spring Branch Independent School District
Donna Independent School District	Stafford Independent School District
Edgewood Independent School District	Taft Independent School District
Edinburg Independent School District	Texarkana Independent School District

COMPONENT 4 – OTHER

Evant Independent School District
 Fort Worth Independent School District
 Frisco Independent School District
 Grand Prairie Independent School District
 Goose Creek Independent School District
 Greg Gibson and Associates
 Hamilton Independent School District
 Harlandale Independent School District
 Harlingen Independent School District
 Houston Independent School District
 La Joya Independent School District
 Legislative Budget Board

Texas Association of School Boards
 Texas Comptroller of Public Accounts
 Texas Education Agency
 Texas Legislative Budget Board
 Texas School Alliance
 Troy Independent School District
 United Independent School District
 Waxahachie Independent School District
 West Independent School District
 Weslaco Independent School District
 Wichita Falls Independent School District
 Ysleta Independent School District

Utah

Davis School District
 Emery School District
 Granite School District
 Grand School District
 Hawthorn Academy Network
 Jordan School District
 Logan School District
 McPolin Elementary School
 Moab School District
 Mountainville Academy
 Pacific Heritage Academy

Reagan Academy
 Salt Lake School District
 San Juan School District
 State Charter School Board of Utah
 Utah International Charter School
 Utah Military Academy
 Utah State Board of Education
 Utah State Charter School Board
 Washington County School District
 West Lake Junior High School
 Woodrow Wilson Elementary School

Virginia

Boutetort County Public Schools
 Danville Public Schools
 City of Newport News
 Fairfax County Public Schools
 Gloucester County
 Gloucester Public Schools
 K12, Inc.
 Lee County Schools

Loudoun County
 Norfolk Public Schools
 Portsmouth Public Schools
 Price Waterhouse Coopers
 Roanoke City Public Schools
 Smyth County Public Schools
 Virginia Department of Planning and Budget

Washington

College Place Public Schools
 Coulee-Hartline School District
 Kent School District
 North Thurston School District
 Olympia School District No. 111
 Pasco School District
 Peninsula School District
 Seattle School District Number One

Snoqualmie Valley School District
 Walla Walla Public Schools
 Washington Department of Social and Health Services
 Washington Office of Superintendent of Public Instruction
 Washington State Board of Education
 Washington State Educational Services District 113
 West Valley School District

West Virginia

West Virginia Department of Education

Wisconsin

Milwaukee Public Schools

Wyoming

Laramie County School District
 Park County School District
 Wyoming Commission for School Facilities

Wyoming Department of Education
 Wyoming Legislative Service Office
 Wyoming School Facilities Commission

Washington, D.C.

Council of Chief State School Officers
 Head Start Bureau

Parrc, Inc.



Tab 6: Forms

Completed forms are provided on the following pages, including:

- Appendix F Assurances and Certification
- Appendix G Release of Proposal as Public Record
- Appendix H Contracts
- Acknowledgement of Amendment One
- Acknowledgement of Amendment Two

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Patrick J. Dyer

Title: Vice President

Signature: 

Date: 01/30/2025

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](#) under “Public Notice” Request for Applications, Qualifications, and Proposals section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: *If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.*



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Authorized Signature



01/17/2025

Date

Patrick J. Dyer, Vice President

Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.


Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

01/29/2025

Date

Patrick J. Dyer, Vice President

Printed Name



Mississippi Department of Education

State Board of Education
Strategic Planning and Performance Scorecard

February 5, 2025

RFX No. 3120003047

Proposal from Cognia, Inc.

cognia[™]

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Cover Page – Proposal Cover Sheet (Appendix A)

We have included our completed and signed Proposal Cover Sheet on the next page.

All other signed forms and amendments are provided under Component 4 – Other, Tab 6.



Appendix A – Proposal Cover Sheet

Company/Name: Cognia, Inc.

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Mark A. Elgart, President and CEO
Mailing Address	9115 Westside Parkway
City, State, Zip	Alpharetta, GA 30009
Telephone:	888-413-3669
E-Mail Address:	legal@cognia.org

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	Mark Quintana, Vice President Southeast Region
Telephone Number	888.413.3669
Email Address	mark.quintana@cognia.org
Physical Address	9115 Westside Parkway
City, State, Zip	Alpharetta, GA 30009
Mailing Address	Same as above
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? VND000253001 | 955257
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: Mark A. Elgart Date: 1/30/2025

Component 1 – Plan of Action

Tab 1 – Production/Detailed Services Plan

Shall provide clear and concise plan of action to encompass the minimum qualifications, implementation, deliverables, and expected outcomes/results to achieve the scope of work. Any required information that is omitted and not addressed in the minimum qualifications section will disqualify submission and will not be considered for an award.

1. Project Initiation and Planning

- **Kick-off Meeting:** Conduct a project initiation meeting with key SBE and Board Designees clarify objectives, timelines, and roles.
 - **Project Work Plan:** Develop a detailed project work plan that outlines milestones, timelines, deliverables, and communication protocols.
 - **Stakeholder Identification:** Identify and document key stakeholders (internal and external) to ensure broad engagement and input throughout the process.
-

Kick-off Meeting

Cognia will conduct a kick-off and project initiation meeting with the State Board of Education (SBE) and Board designees to set the foundation for project success by communicating and confirming objectives, timelines, and roles. The meeting will begin with introductions and an overview of the project's purpose, scope, and measurable goals. A high-level timeline with key milestones and decision points will be presented, along with a clear outline of roles and responsibilities for all stakeholders.

The discussion will also include a communication plan that highlights tools, meeting cadence, and reporting expectations, as well as potential risks and mitigation strategies. The meeting will conclude by summarizing key decisions, assigning immediate next steps, and confirming the date for the next check-in. Detailed meeting notes, including assigned action items, will be provided following the kick-off meeting. This structured approach ensures clarity, accountability, and collaboration from the outset.

Project Work Plan

A detailed project work plan serves as a roadmap, outlining key milestones, timelines, deliverables, and the communication protocol to ensure smooth execution and accountability. Cognia will create a plan that begins by defining clear milestones aligned with project phases and specifies deadlines and key decision points. Timelines will be structured to reflect dependencies



and critical paths, enabling efficient resource allocation and progress tracking. Deliverables will be described in detail, including their format, acceptance criteria, and submission requirements, to ensure alignment with project objectives. The communication protocol will establish the frequency of updates, such as regular status meetings, progress reports, and escalation procedures for addressing challenges. It will also specify tools for collaboration, such as project management software or shared document repositories, to centralize information and streamline team coordination. This comprehensive plan will ensure all stakeholders remain informed, aligned, and focused on achieving project goals.

Stakeholder Identification & Engagement

An effective, collaborative improvement planning team is crucial to developing a powerful improvement plan and critical to its successful implementation. Our collaborative approach requires identifying members of an improvement planning team that represent a wide range of organizational and community perspectives to set improvement priorities. We then work with your team to establish a climate conducive to open dialogue and consensus building. Our Improvement Specialist will support the logistics for all improvement planning team meetings, helping the team to gain comfort with each other and focus on the task at hand. We will work with SBE's strategic planning team and others as directed.

The selection of individuals to serve on the improvement planning team is at the full discretion of your leadership. Cognia suggests SBE leaders consider those stakeholders that are directly impacted from any decisions and can include any of the following: teachers, counselors, support staff, administrators, board members, business representatives, parents/families, higher education professionals, and students. Cognia has experience working with all these stakeholders as part of improvement planning teams.

Cognia works within current successful system processes when possible and works with leadership teams to determine internal processes that need to be amended or added to improve the efficacy and efficiency of activities. In addition, Cognia facilitators assist in establishing a strategic planning committee that is representative of each stakeholder group and organizational department to broaden perspectives by including key voices to develop a shared decision-making model and create a holistic, integrated improvement plan.

2. Environmental Scan and Data Collection

- **Review of Existing Documentation:** Analyze current strategic plans, performance data, and any other relevant documents to understand the organization's context.
- **SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats):** Conduct an analysis to assess internal capabilities and external challenges.
- **Environmental Scan:** Perform a comprehensive scan of the current educational landscape, including trends, regulations, and technological advancements affecting the state of Mississippi.



- **Stakeholder Surveys/Interviews:** Collect input from key stakeholders (board members, educators, policymakers, students, and community members) through surveys, focus groups, or interviews.

Our approach to strategic thinking and planning

Cognia’s Strategic Thinking and Planning process is rooted in evidence-based best practices for effective continuous improvement and our extensive experience engaging with educators and school leaders in strategic planning across the country for over a decade. We encourage our partners to re-envision the strategic planning process. We believe the true value in developing an effective strategic plan is achieved through collective ownership, with the organization’s stakeholders invested in the process—one that challenges leaders and stakeholders to envision the future and chart a path to get there. Our four-phase process, shown in Exhibit 1, pushes leaders and teams to become creative, analytical, and forward thinking.

Please note how and where the elements listed in Section 2 of this RFP entitled “Environmental Scan and Data Collection” are all embedded into Phase 1: Envisioning of Cognia’s Strategic Thinking and Planning process.



Exhibit 1. A four-phase process for strategic thinking and planning.

The final result of our tailored Strategic Thinking and Planning process is a comprehensive Strategic Plan that articulates specific outcomes aligned with input from stakeholders and the organization's key performance priorities. Each priority is conveyed as a long-term objective within the Strategic Plan, providing a clear direction for long-term continuous improvement and success. These objectives are supported by short-term critical initiatives and intended outcomes with key measures. The fully developed plan details the implementation strategies for each prioritized initiative, outlining necessary actions, performance metrics, designated responsibilities, resource requirements, and a timeline for completion.

For an example of how our Strategic Thinking and Planning work is customized, data-driven, and results in specific goals and measures of achievement, please see the case study about our work with Mandaree School District in North Dakota at <https://www.cognia.org/wp-content/uploads/2024/10/A-Journey-of-Holistic-Improvement-and-Cultural-Resilience-Data-Story.pdf>.

“The process was reflective and pushed our leadership strategic planning team to really look at how we could better support our staff and develop processes to focus on true continuous improvement.”

*- Michelle Crosby, Principal
A.R. Rucker Middle School
Lancaster, SC*

Our process is anchored in collaboration and customization based on the distinctive needs of the organization and the stakeholders it serves. Accordingly, Cognia Improvement Specialists will regularly plan and collaborate with SBE leaders—including key staff and board representatives—through a tailored strategic planning process that meets the Board’s unique needs. SBE will receive the following services from Cognia during the term of the contracted consulting engagement:

- **Expert facilitation:** Our Improvement Specialist will help your strategic planning team complete our four-phase strategic planning process
- **Ongoing support:** Our Improvement Specialist will be available between scheduled meetings to help your strategic planning team continue to make progress
- **Support guide:** Participants in the strategic planning process will receive a copy of *inFocus: A Guide for Strategic Thinking and Improvement Planning*
- **Cognia Improvement Platform:** Our online tool will help your team document the planning process, leading to a concise Strategy Map, which will inform development of your strategic plan
- **Online templates:** Our improvement platform includes templates for gathering information and determining improvement priorities
- **Performance Scorecard:** In collaboration with SBE, Cognia will design interactive data visualizations that track progress toward achieving success on the strategic plan, powered by periodic updates to KPI data. These data visualizations will be accessible via an online, public-facing performance scorecard.

Phase 1: Envisioning your potential future

The first phase of our strategic planning process is **Envisioning**. The outcomes of this phase are:

- Review and revision of the organization’s vision, mission, and belief statements as needed



- Statements that define and prioritize the future envisioned by the planning strategic planning team
- Alignment between current reality and future state

Review of Existing Documentation & Data

During this phase, our Improvement Specialist engages and guides the improvement team in engaging professional learning and guided work sessions as they capture the SBE's current reality by reviewing and analyzing existing documentation (including current strategic or improvement efforts and plans) and data showing state-level student performance and SBE operational effectiveness including stakeholder input gathered through surveys or focus group interviews (detailed further below). At this point in the work, we begin to identify and document the organization's strengths and challenges.

Stakeholder Surveys and Interviews

Trust and transparency are important in working with community stakeholders during the crafting of an improvement plan. Cognia will work with SBE leaders to understand the community's cultural context, identify what support you need from the community, and utilize appropriate processes to reach your desired outcome. In addition to engaging various stakeholders with participation in the improvement planning team, your team identifies opportunities throughout each phase of the improvement planning process for the larger community (outside of the improvement planning team) to provide input and feedback on perspectives including but not limited to SBE strengths, challenges, and suggestions for improvement. Our process of engaging communities through surveys, focus groups, and interviews helps educational leaders build important skills while collaborating with community leaders to develop SBE's improvement strategy. Taking advantage of these opportunities will be crucial to promoting shared ownership and helping the community to adopt the improvement plan. The Cognia Improvement Specialist works with your team to plan some or all the following stakeholder engagement activities:

- Developing and administering surveys to various stakeholder groups to gather evidence for improvement priorities
 - Organizations may have perception or experience data based on surveys or inventories used previously. Such data will be included in the environmental scan and used to determine SBE's current reality.
 - In addition, organizations can collect stakeholder perception data using Cognia-certified content or customized surveys. Surveys provide information on how stakeholders feel about the organization, and inventories provide specific data about what stakeholders experience. SBE can select from surveys which have been developed by Cognia's subject-matter experts and expert practitioners or create surveys using locally developed questions. A Cognia facilitator will collaborate with SBE or improvement planning team members to choose or create a survey to meet information needs and to select stakeholder groups/respondents for participation.



- Conducting focus groups and/or interviews of key community stakeholders/partners
 - Cognia has developed a set of potential interview questions for each stakeholder group. SBE leaders can use this list when deciding the most critical questions to ask based on the context of the organization and/or create their own list and share it with Cognia facilitators.
 - When conducting interviews and focus groups, Cognia facilitators take abundant notes using these questions because the responses will be evaluated by using a thematic analysis to capture common themes that can be used as another data source in the environmental scan.
 - Focus groups can be held virtually or throughout the state for identified stakeholders to have reasonable access to participate. The sessions can include large group sessions or public forums as well as smaller focus groups. The large group sessions will offer the community opportunities to hear from SBE and/or Cognia regarding the current state of the organization (including the survey results if available). The event will include time for public questions, answers, and comments. Breakout session focus groups can be held with focused topics determined through collaboration with SBE leaders.

Environmental Scan & SWOT Analysis

Following a deep dive into identifying strengths and weaknesses using current reality data and information, our Improvement Specialist will facilitate an **environmental scan** and exploration of future trends—political, economic, social, technological, and educational trends around the country and in your state that may influence the future of your work, factors that could impact improvement efforts, and an understanding of students’ needs to navigate those trends. In this portion of the process, the strategic planning team identifies and documents opportunities for improvement and threats or external factors to improvement efforts which round out the **SWOT analysis**.

During the final portion of this phase, the Cognia Improvement Specialist will guide the team in synthesizing gaps between the organization’s current reality and future priorities. The information uncovered during this subphase helps create a complete picture of strategic areas of focus that will become the guiding vision of the future. The Cognia Improvement Specialist engages the improvement team in reviewing, and if desired, revising the SBE’s mission and vision. Improvement team members will construct priority statements that articulate the importance of these areas of focus based on collected data, future priorities, stakeholder input, and the organization's vision.

Subphases	Guiding Question	What to Do	Why it is Important
Determine the current reality	What is the organization's current reality? How does the organization know?	Select and analyze information to understand current reality. Make connections to identify topics and themes.	Provides a starting point for understanding the organization's possibilities.
Explore the future	What factors will drive change in education over the next 10 years? Which stakeholder groups will be most impacted? How does the organization know?	Comb through a variety of sources to gain insight about the future. Categorize results into four areas or factors. Determine stakeholder groups most impacted by factors.	Gives guidance and potential levers for long-term improvement.
Synthesize results	What are the connections and gaps between the future and current reality? What are the big ideas or strategic themes for each priority statement? Do the organization's existing guiding principles align with the priority statements? How does the organization know?	Determine connections and gaps between current reality and future priorities. Turn the connections into priority statements. Ensure organization's guiding principles align with the priority statements.	Creates connections and identifies gaps for short- and long- term improvement.

Exhibit 2. Overview of the Envisioning Phase.

Your strategic planning team develops an accurate view of your current reality and identifies gaps between that reality and your desired near-term future. These aspirations are transformed into improvement priorities later in the process.

While envisioning, your team has several templates and tools, shown in Exhibit 3, available to help gather information about your current reality and near-term future:

- Information That Matters
- Future Trends and Sources
- Categorize the Trends
- Stakeholders Most Impacted
- Strategic Themes and Priority Statements
- Guiding Principles
- Cluster the Information



Exhibit 3. Envisioning Phase templates.

Your strategic planning team uses the templates in the inFocus guide and online to gather information about your current reality, then uses this information to envision the future five years away.

3. Strategy Development

- **Mission and Vision Review:** Facilitate discussions with leadership to revisit or reaffirm the organization’s mission, vision, and core values.
- **Goal Setting:** Establish long-term strategic goals based on collected data, stakeholder input, and the organization’s vision.
- **Strategy Formulation:** Develop key strategies and initiatives that address identified needs and opportunities, including those related to educational outcomes, workforce readiness, and technology integration.

Once areas of focus are identified, the vision and mission are finalized, and the priority statements are written, the Cognia Improvement Specialist guides the improvement team to draft long-term strategic goals based on all collected data, stakeholder input, and the SBE’s vision, mission, and areas of focus for the future.

Phase 2: Planning for the organization’s success

The second phase of our strategic planning process is **Planning**. During this phase, our Improvement Specialist engages your team in a dual-purpose session of professional learning, engagement, and work to determine how those priorities will be addressed. Our expert facilitator starts your team’s work toward a **Strategy Map**. As the team’s input helps construct the map, the team identifies near-term objectives aligned to your vision, mission, and beliefs. The team will develop and formulate key strategies and critical initiatives that align to each long-term strategic

goal or objective for each identified area of focus and determine how those priorities will be addressed. For each critical initiative, the SBE will collaborate and identify the following:

- An articulated intended outcome
- The key measure that will capture evidence of achieving the intended outcome
- List of assumptions of how and why the approach should be successful
- List of influential factors that could impede or advance the work

Our process focuses on your context and culture, which helps your team identify the specific priorities and actions required for success. Once each critical initiative is fully developed, your strategic planning team prioritizes the critical initiatives that should be addressed in the first year of implementation. Your team will then assign critical initiatives to a timeline, resulting in an **Annual Improvement Plan** that shows the sequence of actions you will take to realize your objectives. Once the Strategy Map and Improvement Plan are complete, your team will have a **Theory of Action**, an explicit model showing how your plans will lead to achieving your goals.

Also, as a culminating activity of this phase, your team determines how and when to communicate the long-term strategic plan to both internal and external stakeholders. To assist in the communication process, the outputs of this phase are a **Strategy Map** (i.e., a long-range plan) and **Annual Improvement Plan** (i.e., a one-year plan) describing which critical initiatives will be addressed in year one that include:

- Objectives that address strategic themes or areas of focus
- Critical initiatives to reach the articulated goals or objectives
- Key measures of success for each critical initiative

Exhibit 4 identifies the subphases of planning, including the questions to be answered and the actions to be taken.

Subphases	Guiding Question	What to Do	Why it is Important
Use priorities to create objectives and identify critical initiatives	What are the objectives that address the priorities? What critical initiatives will enable the organization to achieve the objectives?	Turn each priority into an objective. Use evidence-based practices to address and achieve each objective.	Allows time to plan for the organization's long- and short-term improvement based on identified priorities.
Identify outcomes and key measures for each critical initiative	What is the intended outcome of each critical initiative? What are the key measures for each critical initiative?	Determine the result organization leaders expect from each critical initiative. Decide how each critical initiative will be assessed or measured for its effectiveness.	Establishes desired results of critical initiatives' implementation; helps to define relationships between outputs and outcomes.

Subphases	Guiding Question	What to Do	Why it is Important
Identify inputs for the Strategy Map	<p>What information about improvement planning does the organization share with its stakeholders?</p> <p>How is the information communicated to stakeholders?</p>	<p>Use a visual representation to show the organization's long-term direction for improvement.</p> <p>Identify ways to communicate the long-term direction with stakeholders.</p>	Provides a concise, comprehensive summary of the organization's improvement plan to share with all stakeholders.
Identify inputs for the Annual Improvement Plan	What does the organization want to accomplish during the coming year?	<p>Decide what the organization's focus is for the term of the work and tentatively plan for subsequent years.</p> <p>Develop the Annual Improvement Plan.</p>	Ensures the Annual Improvement Plan has priorities to focus on for the coming year.

Exhibit 4. Overview of the Planning Phase.

Your strategic planning team develops a concise, action-oriented plan for improvement that is appropriate to your context and culture. The resulting improvement priorities and action strategies will be ready for implementation.

While planning, your team has access to the following templates to develop improvement priorities and action strategies:

- Objectives and Key Measures
- Annual Improvement Plan
- Strategy Map

4. Performance Scorecard Development

- **KPI Identification:** *Develop Key Performance Indicators (KPIs) for each strategic goal, ensuring they are measurable and aligned with the organization's mission.*
- **Scorecard Design:** *Create a performance scorecard that visually tracks progress toward strategic goals. The scorecard should include metrics, targets, timelines, and responsibilities for monitoring and reporting.*
- **Data Collection Mechanisms:** *Identify or create systems for ongoing data collection to measure the effectiveness of strategies and track KPIs.*

Data Collection & Reporting Mechanisms

Cognia facilitators will collaborate with SBE leadership to

- Identify how progress will be measured toward each critical initiative outlined in the plan.
- Select measurement tools to utilize.
- Provide support for data analysis and synthesis as needed/appropriate.
- Determine schedules/frequency of data collection for progress monitoring and annual evaluation.
- Facilitate sessions of data collection for Key Performance Indicators (KPIs) to verify or quantify progress and outcomes of each.

Our team will design an interactive **performance scorecard** tailored to effectively track progress toward strategic goals. The scorecard will feature visually intuitive layouts that integrate KPIs, clearly defined targets, timelines, and designated responsibilities for monitoring and reporting. By aligning these elements, the scorecard will provide stakeholders with actionable insights, facilitate informed decision-making, and ensure accountability. We will incorporate customizable dashboards and reporting tools that update based on new KPI data inputs and ensure seamless communication of performance outcomes. We have extensive expertise in crafting clear, engaging, and visually appealing materials to effectively communicate complex plans to diverse stakeholders. Our team ensures that every piece is strategically designed to inform, inspire confidence, and drive understanding.

Exhibits 5–9 show examples of data visualizations we designed in collaboration with Fleming County Schools (KY) to integrate with the scorecard for their strategic plan. We can create similar reporting tools for SBE and its stakeholders.

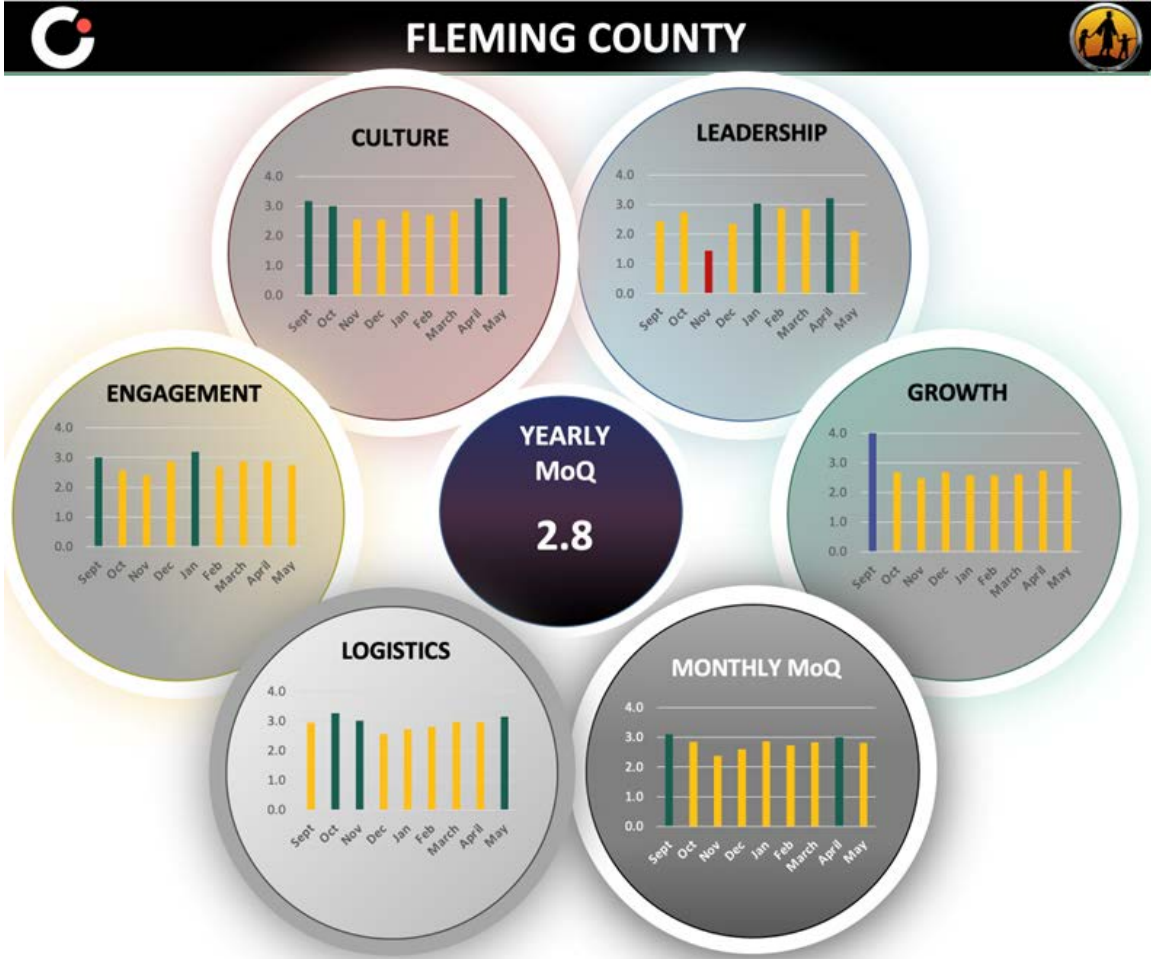


Exhibit 5. Fleming County Schools Performance Scorecard, Sample 1.

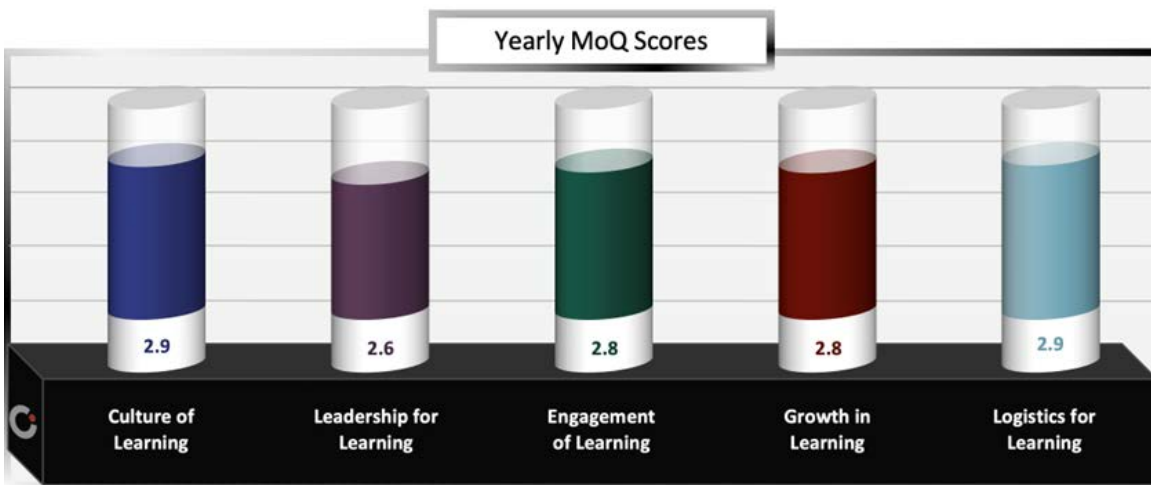
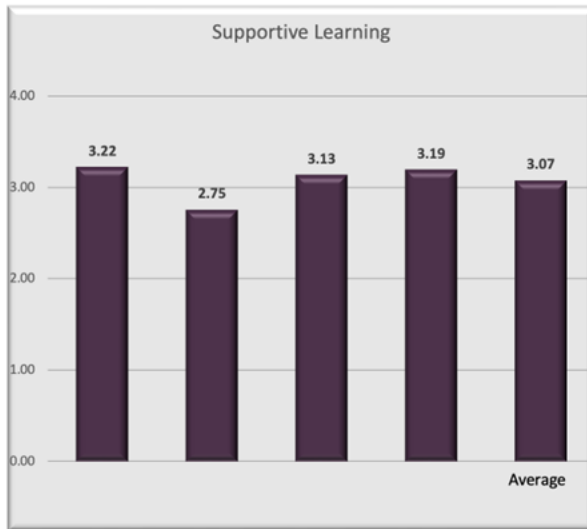
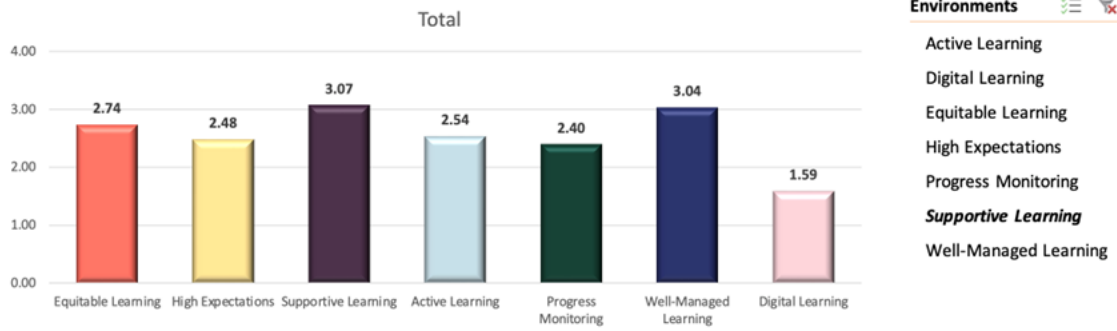


Exhibit 6. Fleming County Schools Performance Scorecard, Sample 2.

Effective Learning Environment Observation Tool (eleot)



1. Learners demonstrate a sense of community that is positive, cohesive, engaged, and purposeful
2. Learners take risks in learning (without fear of negative feedback)
3. Learners are supported by the teacher, their peers and/or other resources to understand content and accomplish tasks
4. Learners demonstrate a congenial and supportive relationship with their teacher

Exhibit 7. Fleming County Schools Performance Scorecard, Sample 3.



FLEMING COUNTY



Teacher Observation Tool (TOT)

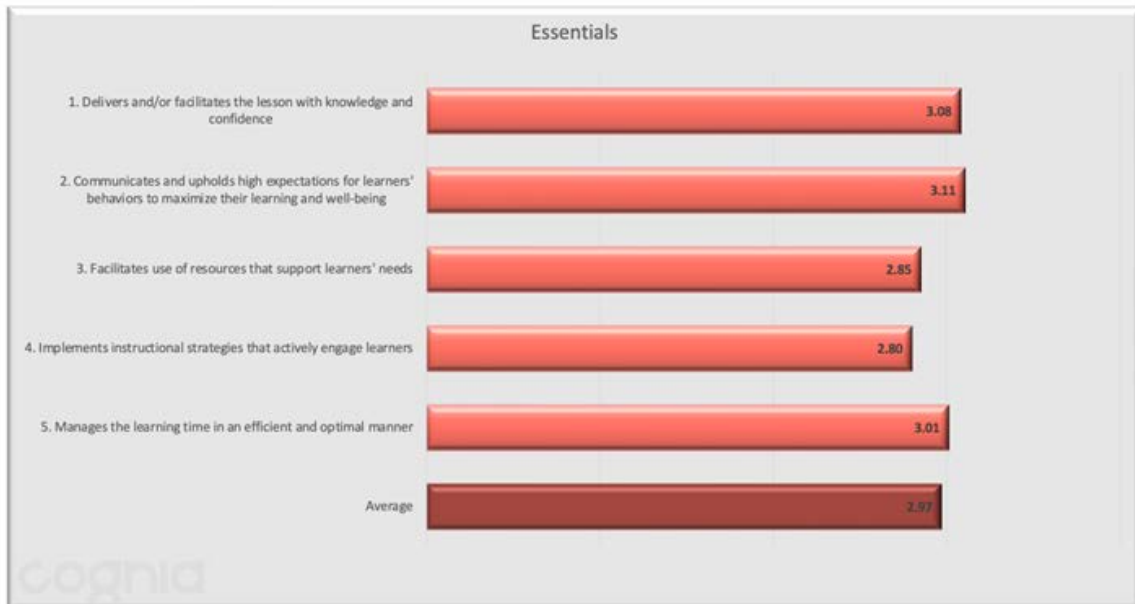
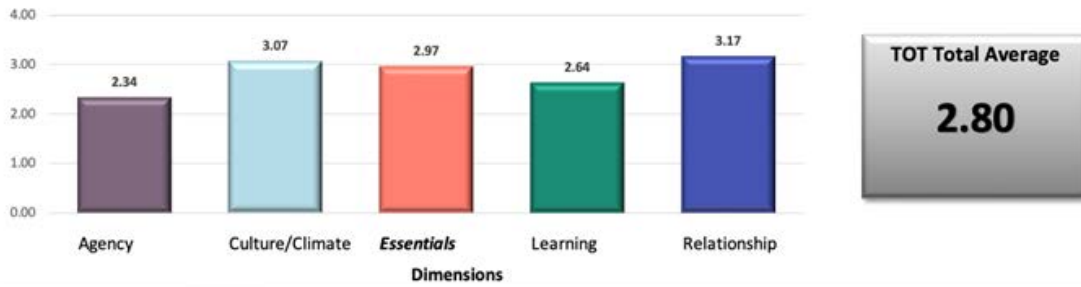


Exhibit 8. Fleming County Schools Performance Scorecard, Sample 4.



Facilities/Grounds/Maintenance MoQ Scores

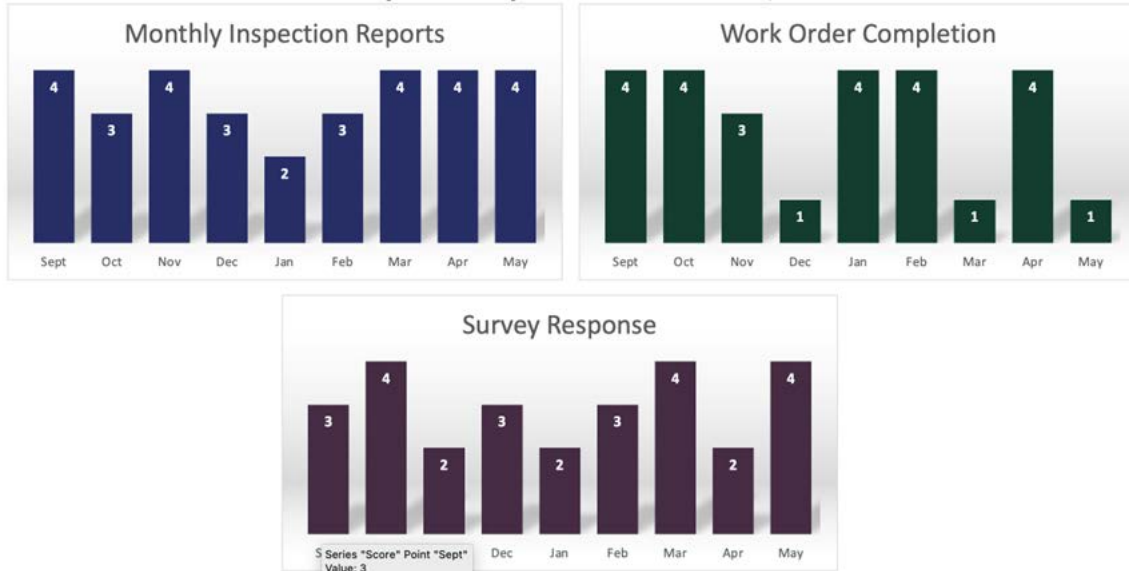


Exhibit 9. Fleming County Schools Performance Scorecard, Sample 5.

5. Stakeholder Engagement and Workshops

- **Stakeholder Workshops:** Facilitate workshops with board members, educators, and community leaders to gather feedback on the draft strategic plan and performance scorecard.
- **Engagement Plan:** Develop a stakeholder engagement plan to ensure continued involvement throughout the process, from strategy formulation to final approval.
- **Feedback Incorporation:** Revise the strategic plan and scorecard based on stakeholder input and feedback received during workshops.

Stakeholder Workshops

We propose a structured and inclusive approach to facilitating stakeholder workshops (including professional learning about the process and work sessions to create and implement improvement plans. These sessions are created using the following:

- **Preparation:** We will collaborate with your team to define workshop objectives, ensure alignment with organizational goals, and identify key participants, including board members, educators, and community leaders.
- **Execution:** Our experienced facilitators will employ interactive methodologies such as breakout groups, real-time polling, and engaging discussions to foster meaningful dialogue and ensure diverse perspectives are captured.

- **Deliverables:** Following each workshop, we will provide a detailed summary report highlighting key insights, themes, and actionable recommendations to refine the strategic plan and performance scorecard.

Engagement Plan

Cognia’s strategic thinking and planning process ensures ongoing stakeholder involvement as described in the section entitled, “Stakeholder Identification and Engagement.” Elements of this comprehensive engagement plan are referenced in each phase description and include:

- **Stakeholder Mapping:** Identifying key stakeholders and their roles in tailoring engagement strategies.
- **Communication Strategies:** Implementing regular updates through newsletters, webinars, and progress reports to maintain transparency and interest.
- **Touchpoints:** Scheduling periodic check-ins and feedback sessions at critical milestones to ensure alignment and adaptability.

Feedback Incorporation

We are committed to ensuring that stakeholder feedback is effectively integrated into the strategic plan and performance scorecard:

- **Systematic Review:** All feedback collected during workshops will be categorized and analyzed for alignment with organizational priorities and objectives.
- **Iterative Refinement:** Using an iterative approach, we will update the strategic plan and scorecard in stages, incorporating feedback while maintaining consistency with your vision.
- **Validation:** Prior to finalizing the plan, we will present a revised draft to stakeholders for validation, ensuring the final product reflects collective input and buy-in.

6. Drafting and Finalizing the Strategic Plan

- **Draft Strategic Plan:** *Develop a detailed draft of the strategic plan that includes the mission, vision, strategic goals, key initiatives, and performance scorecard.*
 - **Review and Revision:** *Present the draft to the leadership team for review and make necessary revisions based on feedback.*
 - **Final Strategic Plan:** *Finalize the strategic plan, ensuring it is a clear, actionable document that includes timelines, responsible parties, and measures for ongoing evaluation.*
-

Following collection and analysis of data during the previously described phases, Cognia facilitators will collaborate with SBE using their documented plan components created throughout each of the phases to create the Strategic Plan. The Strategic Plan will document SBE’s mission, vision, strategic goals, key initiatives, and performance scorecard.



Draft Strategic Plan

Our approach to developing a comprehensive strategic plan is rooted in collaboration and data-driven insights. We will:

- Identify and articulate strategic goals that address both immediate priorities and long-term aspirations.
- Develop actionable key initiatives tied to each strategic goal, ensuring alignment with organizational capacity and resources.
- Create a performance scorecard using relevant metrics and Key Performance Indicators (KPIs) to measure progress effectively.

Review and Revision

The draft strategic plan will be presented to the leadership team in a structured review session. During this process, we will

- Implement an iterative review process that allows for multiple rounds of review and refinement to ensure alignment with leadership expectations and stakeholder needs.
- Gather feedback through discussions, surveys, and follow-up meetings to capture diverse perspectives.
- Focus revisions on addressing identified gaps, clarifying objectives, and incorporating stakeholder insights to ensure the plan's relevance and effectiveness.

Final Strategic Plan

The finalized strategic plan will reflect validated revisions from the iterative review process. It will include clear timelines, milestones, and assigned responsibilities, ensuring alignment with organizational goals and readiness for implementation. With a focus on actionable outcomes, we will deliver a strategic plan and performance scorecard that resonate with SBE stakeholders and drive impactful results. The finalized plan will then be presented to the Board for approval.

7. Final Presentation and Handover

- **Presentation to the Board:** Present the final strategic plan and performance scorecard to the board for approval.
 - **Documentation Handover:** Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.
 - **Training Session:** Conduct a training session for staff on how to use and monitor the performance scorecard to ensure proper implementation.
-

Presentation to the Board

Our team will prepare and deliver a professional and engaging presentation of the final strategic plan and performance scorecard to your board of directors. The presentation will

- Highlight key strategic priorities and their alignment with organizational goals.
- Demonstrate how the performance scorecard will drive measurable outcomes.
- Provide a clear implementation overview, including milestones and metrics.

We will collaborate closely with your team to schedule the presentation at a convenient time and tailor the content to address specific questions and expectations of the board.

Documentation Handover

We will ensure all final documents are complete, free from errors, and formatted for ease of use. Deliverables will include the following:

- **Strategic Plan:** A detailed document outlining organizational goals, strategies, and actionable steps.
- **Performance Scorecard:** A dynamic and interactive tool to track progress toward strategic objectives.
- **Implementation Roadmap:** A step-by-step plan with timelines, resources, and responsible parties for successful execution.
- **Monitoring Plan:** A framework to review and evaluate performance metrics regularly.

All documents will be provided in both electronic (PDF, Word, Excel formats) and high-quality print formats.

Training Session

Following final approval by the Board, we will conduct an interactive training session to ensure your staff can effectively utilize and monitor the performance scorecard that includes

- An overview of the scorecard's structure and functionality.
- Hands-on activities for staff to practice data entry, analysis, and reporting.
- Guidelines for regular performance reviews and corrective action planning.

Our training materials will include guidance for users of the platform, the *inFocus Guide* that describes the process, quick reference guides and videos, and access to follow-up support for additional questions or clarifications.



8. Implementation and Monitoring Plan

- **Implementation Roadmap:** Develop a roadmap that outlines the steps needed to implement the strategic plan, including timelines, resources, and responsibilities.
 - **Monitoring and Reporting Mechanism:** Create a process for regularly monitoring progress on the strategic plan and scorecard, including tools for tracking KPIs and reporting results to stakeholders.
 - **Review and Adjustment Protocol:** Establish a protocol for reviewing and adjusting the strategic plan and performance scorecard as needed to respond to changing conditions or emerging challenges.
-

Phase 3: Implementing, the key to making improvement happen

Once we have collaborated with the SBE's strategic planning team to progress through the Envisioning and Planning phases of the process and we have received final approval of the plan from the SBE's board, we will move into the **Implementing** phase. The outcomes of this phase are the following:

- Detailed Annual Implementation Plan (for Year One)
- Clear stakeholder roles and responsibilities
- Progress monitoring reports

Too many strategic plans are put on a shelf, never to be read or used because implementation plans with clearly assigned responsibilities, reasonable timelines, or accountability measures were not well defined, if at all. During the Implementing phase, our Improvement Specialist will coach SBE's leaders and strategic planning team as you work with school and community stakeholders to transform the five-year Improvement Plan into workable implementation plans.

The **Annual Implementation Plan**, or **Implementation Roadmap**, assigns specific activities to individuals or teams who will complete the critical tasks, monitor progress, and measure results. If desired, our tools and processes will be available to guide the team as they communicate what's happening to appropriate internal and external stakeholders. Our communication strategies are designed to get all stakeholders to rally together to support completion of the critical initiatives for each of the objectives and make the envisioned future the new reality.

Success during the Implementing phase depends on regular monitoring and reporting. SBE leaders and improvement team members need to monitor changes in data and review progress reports to determine whether the plan is proceeding as expected and producing desired results. Some plans may need to be adjusted based on the progress reports. If so, we show leaders how to involve stakeholders in reviewing the reports and determining next steps. Involving stakeholders in making revisions during implementation helps sustain enthusiasm and engagement and keeps your objectives clearly in view.

While implementing, your strategic planning team will have access to templates designed to help you monitor progress, including the following:

- Annual Implementation Plan
- Five-Year Improvement Plan
- Progress Monitor Card
- Stakeholder Responsibility Card

Phase 4: Evaluating the effectiveness of improvement plans

The fourth and final phase of the strategic planning process is **Evaluating**. The outcomes of this phase are:

- Evaluation of the impact of each critical initiative
- Judgments about the success of overall plan
- Information to be used for the next planning cycle

During this phase, our Improvement Specialist guides the strategic planning team in using the **Monitoring Plan**, in combination with the knowledge and key measure data gathered to this point, to evaluate the effectiveness of the actions taken to address their improvement goals. They will reflect on the improvement initiatives they chose, the strategies used during implementation, and key measurement data gathered throughout the process to make judgments about whether they are making progress toward their goals. They will also reflect on whether critical initiatives were implemented with fidelity and identify influential factors that contributed to or impeded success. After exploring what happened during the implementation year, the team will identify what lessons and initiatives need to be incorporated into the next planning cycle.

Exhibit 10 shows the products that your strategic planning team will have at the conclusion of the strategic planning process, starting with the Strategy Map:

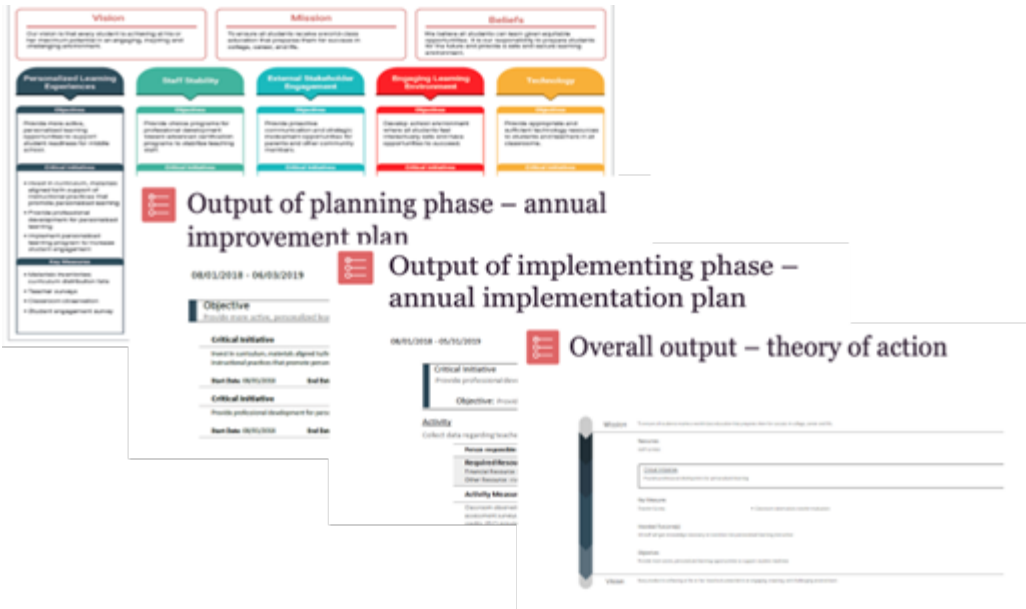


Exhibit 10. Sample products from the strategic planning process.

Templates available in the Cognia Improvement Platform will help the strategic planning team gather information and report progress throughout the process.

While evaluating, your team has access to a **Theory of Action** template to determine your plan's success and identify next steps.


Minimum Qualifications

The following minimum qualifications are mandatory. If, in the opinion of the MDE, the Offeror fails to prove that the proposing company meets any of these **minimum qualifications**, the proposal will be disqualified from further evaluation. It is the responsibility of the Offeror to submit a complete proposal on or before the submission deadline. Offeror must have at least 5 years' experience in strategic planning and performance management with other educational organizations. The offeror should provide information that demonstrates ability to engage and collaborate with a wide array of stakeholders. The ability to research and analyze data to determine trends and to establish a performance tracking system.

1. The Offeror must provide:

- a. Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

Cognia is a registered vendor with the Mississippi Secretary of State's office (Vendor ID: 955257) and maintains a status of Good Standing, thus authorizing us to conduct business in the state.



Michael Watson
SECRETARY OF STATE

This is not an official certificate of good standing.

Name History	
Name	Name Type
Cognia, Inc.	Legal
Advance Education, Inc.	Previous Legal

Business Information	
Business Type:	Non Profit Corporation
Business ID:	955257
Status:	Good Standing
Effective Date:	08/31/2009
State of Incorporation:	GA
Principal Office Address:	9115 Westside Parkway, 9115 Westside Parkway Alpharetta, GA 30009

Exhibit 11: Screenshot from the Mississippi Secretary of State website.

b. The age of the Offeror's business and average number of employees for the past five (5) years,

Cognia was formed in 2019 following the merger of two nonprofit education improvement organizations, AdvancED and Measured Progress. The lineage of our dates back to 1895. Currently, we have 447 employees, and over the past five years, we have averaged 461 employees.

c. Offerors must list their principals, parent organizations, and subsidiary organizations in their proposal or qualification. Principals shall include founder, investors, owner, co-owners, CEO, Chief, all executive level employees.

Cognia is incorporated in Georgia and maintains a non-profit 501(c)(3) status. Our headquarters are in Alpharetta, Georgia, and we maintain corporate offices in Portsmouth, New Hampshire. We are governed by an independent Board of Directors and an executive team dedicated to our values, our strategic direction, and our commitment to focusing on improved outcomes for all students.

Exhibit 12 shows the organizational structure of Cognia.



Exhibit 12. Cognia organizational chart.

d. The abilities, qualifications, and experiences of all persons who would be assigned to provide required services,

This information is provided under Component 2 – Administration, Tab 2 – Resume(s) for Key Personnel.

e. The required references as noted in Section 3 – References, and

This information is provided under Component 2 – Administration, Tab 3 – References.

f. The Offeror must provide a detailed plan describing how the scope of services will be planned, implemented, achieved, and the reports provided that will give the MDE the support and results required to verify services were accomplished and complete.

Our detailed plan describing our approach to meeting all requirements of the scope of services is provided earlier in this tab, Component 1 – Plan of Action Tab 1 – Production/Detailed Services Plan.

2. The Vendor shall provide all services directly related to this contract from an office(s) located in the United States. Indicate your agreement with this requirement and identify any locations outside the State of Mississippi in which you propose to provide the services described in this solicitation.

Cognia will conduct all services under this solicitation within the United States. In addition to work completed by staff members on location in Mississippi, certain activities may be performed at Cognia's headquarters, located in Alpharetta, GA.

3. Include in your responses the total number of years in business and the company's experience related to the scope of work.

Cognia has a 130-year history serving educational institutions. Our organization was formed in 2019 following the merger of two nonprofit education improvement organizations, AdvancED and Measured Progress. Each institution brought to the new organization a long history of thought leadership, research, advocacy, and service to students, educators, schools, districts, and state education agencies. A timeline of our evolution is shown in Exhibit 13.



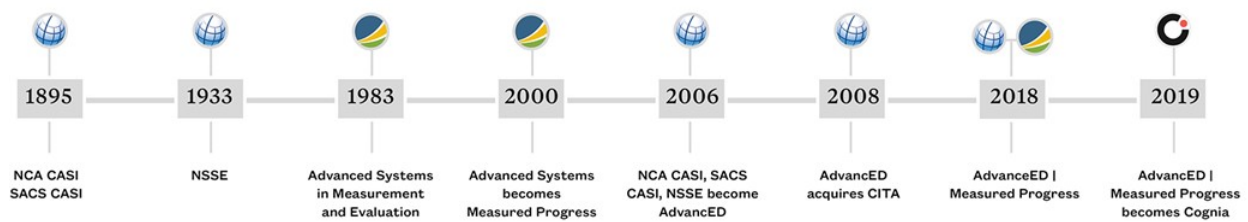


Exhibit 13. Cognia history at-a-glance.

Cognia has deep roots in continuous improvement, including accreditation and certification, assessment, professional learning, and improvement services to institutions and other education providers.

A comprehensive customized solution provider

Cognia is the largest education improvement organization in the world and a force for enhancing schools, engaging students, and driving better outcomes for all. We offer accreditation and certification, assessment, leadership development, and professional learning services within a framework of continuous improvement. We seek to create long-lasting partnerships with district- and state-level institutions and other service providers, and some of our engagements have lasted decades. Cognia focuses on the following areas in serving the education community:

- **Strategic Thinking and Planning:** We help schools address root causes for underperformance, guide improvement actions, and build leadership capacity to champion meaningful change and continuous improvement. We adapt our processes to meet the needs of our diverse clientele, but several key features of our approach are consistent:
 - Active engagement with representatives from all stakeholder groups: district leaders, educators, students, parents, community leaders
 - Focus on inclusion in stakeholder feedback, data collection and analysis, needs assessment, and goal setting
 - Using the surveys, inventories, templates, tools, and resources of the web-based Cognia Improvement Platform to identify and develop the inputs and artifacts of the improvement plan
 - Expert facilitation by Cognia Improvement Specialist through every phase of the review
- **Professional learning:** We are learning experts known for providing meaningful professional learning solutions tailored to achieving defined learning objectives.
 - **Online and face-to-face professional learning opportunities:** We serve thousands of educators annually by delivering professional learning sessions that cover the areas of accreditation, assessment, climate and culture, leadership, effective learning environments, and student learning. Each year we survey our network member schools to identify development needs, then respond by crafting research-based, effective learning opportunities. We also customize our learning opportunities to meet the requirements of specific districts and schools. All professional learning sessions can be delivered face-to-face or online.



- **Professional learning communities (PLCs):** We facilitate PLCs around common problems of practice to promote collaboration, collective inquiry, knowledge sharing, and action toward desired results. Between learning opportunities, small groups meet face-to-face or online with one of our Improvement Specialists to share how they are implementing what they have learned in their classrooms. Our Improvement Specialists use PLCs to promote collaboration, collective inquiry, knowledge sharing, and action toward desired results.
- **Online learning:** We provide online webinars, video tutorials, online facilitator-led courses, asynchronous online training, and training and certification courses. Educators can extend their learning by accessing resources in the Cognia Learning Community, a comprehensive online learning environment. Educators can create a personalized playlist of learning opportunities, called Learning Labs, in which they review professional resources, reflect on what they learned, and share experiences and feedback with online peers.
- **Leadership Support:** Cognia's Leadership Circle is an online community for job-alike school district leaders, superintendents, and their executive teams. The Leadership Circle is an intimate and trusted community to help leaders collaborate efficiently and authentically with like-minded peers, with individualized support and pragmatic content that supports leaders in their daily responsibilities. Through an annual subscription, the format of Leadership Circle allows district and school leaders to engage in a series of interactive learning and collaborative problem-solving opportunities.
- **School Culture:** Teachers have the greatest impact on the success of every student's learning journey. Creating a healthy school culture demonstrates fundamental support for teachers and encourages professional growth, commitment to their schools, and instructional effectiveness. Nurturing teacher voice and agency leads to a culture of unity and shared goals with leaders, which in turn motivates teachers to do their best work, stay in their schools, and continue in the field of education. Cognia offers specific tools to analyze and foster healthy school culture, including surveys, MyVoice online teacher perception ratings, and professional learning sessions.
- **Conferences:** We hold state, regional, and global events each year, providing thought leadership, insights, best practices, and networking opportunities to the global education community.

Relevant Similar Experience

State Education Agencies

Cognia collaborates with multiple state education agencies to provide a broad spectrum of continuous improvement services. Through these partnerships, we work with diverse stakeholders to conduct research, analyze data, identify trends, and develop performance tracking systems. Exhibit 14 highlights several of these engagements from recent years.

Program	Contract Dates	Services
Kentucky Department of Education	2011–Present	<ul style="list-style-type: none"> • Diagnostic Review • Diagnostic and Survey Instruments • Common Improvement Planning and Progress Monitoring Templates • Professional Learning • Annual Improvement Summit
Alabama State Department of Education	2012–Present	<ul style="list-style-type: none"> • Statewide System of Continuous Improvement • Diagnostic and Survey Instruments • Common Improvement Planning and Progress Monitoring Templates • Professional Learning • Federal Program Compliance Monitoring
North Dakota Department of Public Instruction	2013–Present	<ul style="list-style-type: none"> • Diagnostic Review • Continuous Improvement Planning • Implementation/Evaluation • Professional Learning inc. Peer-to-Peer Programs • Annual School Improvement Conferences • ND ESSA Advisory Committee Member • Student Engagement Surveys • Leadership Development
South Carolina Department of Education Office of School Turnaround	2016–Present	<ul style="list-style-type: none"> • Diagnostic Review • Professional Learning • Classroom Observation Tools • Best Practice Showcase • Progress Monitoring Review
Montana Office of Public Instruction	2020–Present	<ul style="list-style-type: none"> • Diagnostic Review • Professional Learning • Classroom Observation Tools • Annual Improvement Summit • Formative Assessment

Exhibit 14. Some recent state-based continuous improvement engagements.

Strategic Thinking and Planning

For over a decade, Cognia has been engaged by schools and districts, state education agencies, and educational organizations to provide strategic planning services. Some recent engagements are shown in Exhibit 15.

School/District	City, State	Project Duration
Killip Elementary	Flagstaff, AZ	2023–2024
Montana School for the Deaf and the Blind	Great Falls, MT	2022–2024
St. John’s County School District	St. John’s County, FL	2022–present
Mandaree Schools	Mandaree, ND	2022–present
Alachua County Public Schools	Gainesville, FL	2023–present
The School Board of Martin County	Stuart, FL	2023–present
Forest Municipal School District	Forest, MS	2024–Present
Bay District Schools	Panama City, FL	2024–Present

Exhibit 15. Cognia’s recent strategic planning engagements.

4. If federal funds are allocated for payment, Offeror must verify its business is not debarred.

Cognia certifies that we are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transaction by any federal department or agency or any political subdivision or agency of the State of Mississippi.

5. Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

Cognia acknowledges and will comply with the requirement to secure a performance bond for 100% of the awarded annual contract amount.



Component 2 – Administration

Tab 2 – Resume(s) for Key Personnel

Must include qualifications and experiences for all key personnel assigned to this project.

Staffing Model and Experience and Qualifications of Key Cognia Personnel

We purposefully selected experts to work with the Mississippi State Board of Education on this project. They have a wealth of knowledge and understanding of the unique context and culture of the state. Exhibit 16 shows our staffing plan for facilitating and supporting this work. Following the exhibit, we have included their CVs.

Name	Title & Responsibility
Program and Relationship Management	
Mark Quintana, Ed.D.	<i>Vice President, Southeast Region</i> Dr. Mark Quintana is a leader within K–20 education stemming from experiences as a classroom educator, Magnet School Program/Curriculum Coordinator, K–12 Curriculum Administrator, and School Improvement Administrator for Broward County Public Schools (the sixth-largest school district in the country). Mark also has served for approximately 20 years as an Adjunct Professor for several colleges and universities in and outside Florida. As a Vice President, Mark leads, nurtures, and facilitates partner relationships and oversees the completion of work.
Jeremy Stinson, Ph.D.	<i>State Director, Mississippi</i> Dr. Jeremy Stinson is Cognia's Director for Mississippi and Arkansas. He provides support through professional development and technical assistance to member schools and systems in their continuous improvement journey. In addition, Jeremy supports Cognia's professional learning opportunities for educational professionals to optimize success for every student. He supports public, charter, and private schools and districts, providing guidance and technical assistance for all tools and resources included in Cognia membership as well as group and individual training and coaching in continuous improvement. Jeremy joined the Cognia team having served in education for 24 years, most recently as Superintendent of Mississippi Schools for the Deaf and the Blind in Jackson. As superintendent, Dr. Stinson led two very distinct special needs schools with departmental oversight in special services, finance, operations, building and grounds, transportation, technology, residential, athletics, and outreach. He also has experience as a teacher, assistant principal, principal, administrative and teacher mentor, assistant superintendent, state director, student teacher advisor for Mississippi State University's Department of Curriculum and Instruction, and adjunct professor for the University of Mississippi's Department of Leadership and Counseling.

Name	Title & Responsibility
Improvement Services Leadership	
Lisa Stone, Ed.D.	<p><i>Senior Vice President, Professional Learning</i></p> <p>Dr. Lisa Stone, Senior Vice President of Professional Learning, has a long history in the field of education, having spent time at both the classroom and administrative levels. Lisa is dedicated to continuous improvement and has impacted school and district growth through instructional leadership. She has developed and facilitated relevant professional learning to equip teachers and administrators to implement practices that lead to improved culture and increased student achievement. She leads the Improvement Services team in providing meaningful professional learning experiences for educators. Lisa engages with clients and staff to ensure professional development opportunities are personalized to meet needs, support school and classroom practice, and impact learners.</p>
Amy McVey	<p><i>Vice President, Professional Learning</i></p> <p>Ms. Amy McVey serves as Vice President of Professional Learning for Cognia and supports institutions, teachers, leaders, and learners in all areas of continuous school improvement. A veteran in education, Amy has experience as a primary and intermediate teacher, curriculum coach, and principal. Before retiring from public education, she was the principal at Veterans Park Elementary, an NCLB Blue Ribbon School, in Lexington, Kentucky. Amy has served as a lead evaluator and team member on numerous Engagement Review Teams for schools and systems over the past 16 years. Amy is an engaging presenter with experience across a wide range of audiences from students and teachers to school and district leaders, often focusing on topics that include leadership development, strategic thinking and planning, or student engagement. She collaborates and solutions with Cognia staff and clients to develop customized professional learning plans; oversees all aspects of professional learning delivery for internal staff and clients; manages her team's delivery, feedback, budget, and reporting; directs quality assurance for professional learning delivery within and outside the organization; and serves on cross-functional teams to support the mission and vision of Cognia. To date, Amy has 35 years of experience in education.</p>
Nicole Reeves, Ed.D.	<p><i>Senior Director, Professional Learning</i></p> <p>Dr. Nicole Reeves serves as Senior Director of Professional Learning for Cognia. Nicole's education includes bachelor's degrees in both Education and Special Education and both a master's and a doctoral degree in Educational Leadership. Nicole assists institutions in all areas of professional learning and school improvement. An experienced trainer, presenter, and facilitator, Nicole has presented at several local, regional, and national conferences, including those hosted by AdvancED, Cognia, Louisiana Association of Principals, SACS/CASI, Associated Professional Educators of Louisiana, and National Catholic Education Association, and has trained and facilitated several active work sessions for teachers, administrators, and board-level personnel at all levels in various types of educational institutions. Nicole has vast educational experience in schools spanning 24 years, including teaching special needs students, sixth grade, and first grade before becoming curriculum coordinator/librarian, assistant principal, and principal. To date, Nicole has 32 years of experience in education.</p>

Exhibit 16. Key Personnel.





Amy McVey

Vice President, Professional Learning

Summary of Qualifications

Amy McVey supports institutions, teachers, leaders, and learners in all areas of continuous school improvement. A veteran in education, Amy has experience as a primary and intermediate teacher, curriculum coach, and principal. Before retiring from public education, she was the principal at Veterans Park Elementary, a NCLB Blue Ribbon School, in Lexington, Kentucky. She has served on and chaired the AdvancED/SACS CASI Kentucky Council, as well as serving as a voting member on AdvancED National Accreditation Commission. Amy has served as a Lead Evaluator and team member on numerous Engagement and STEM Review Teams for schools and systems over the past 16 years. Amy is an engaging professional learning facilitator and presenter with experience across a wide range of audiences from students and teachers to school, district, and state leaders.

Education

M.A., Elementary Education,
Georgetown College

B.S., Elementary Education,
Eastern Kentucky University

Certifications

Rank I Administration and
Supervision,

University of Kentucky

Certified Elementary
Principal

Professional Experience

2020–present **Vice President, Professional Learning, Cognia**

Collaborates and solutions with Cognia staff and clients to develop customized professional learning plans; oversees all aspects of professional learning delivery for internal staff, contractors, and clients; manages team's delivery, feedback, budget, and reporting; quality assurance for professional learning delivery within and outside the organization; serves on cross functional teams to support the mission and vision of Cognia.

2017–2020 **Director, Improvement Services, AdvancED**

Oversaw and provided customized professional learning, staff development, coaching, engagement review training, eProve training & support. A certified Engagement Review Team Member, STEM Review Team Member and an Early Learning Team Member.

2001–2017 **Principal, Veterans Park Elementary and Dixie Elementary, Fayette County Public Schools**

While the leader at Veterans Park Elementary, the school was named a Kentucky Unbridled Learning Distinguished School, a NCLB Blue Ribbon school, National PTA Parent Involvement School of Excellence, and a Kentucky Department of Education Pacesetter School, member of the Kentucky Leadership Academy, Superintendent's Advisory Council, Kentucky Association of School Administrators Board of Directors and Kentucky Association of Elementary School Principals.

While at Dixie Elementary was a Kentucky Association of schools Council Trainer, Southern Association of Colleges and Schools Kentucky Chairperson, and the Kentucky Department of Education eWALK Trainer.

1997–2001 **Professional Staff Assistant, Veterans Park Elementary**

Vice-Chair of SBDM Council, Professional Development Chairperson, Interview Committee member, SBDM Secretary, and Distinguished Patriot.

Amy McVey

Vice President, Professional Learning

1989-1997 Teacher, Ashland Elementary and Stanton Elementary

A Primary Teacher at Ashland Elementary, Chairperson of the Curriculum and Instruction Committee, Co-Chairperson of the Transformation Steering Committee, District Math Representative, Primary Liaison, Curriculum Forum Representative, Co-School Technology Coordinator. A Fifth Grade Teacher at Stanton Elementary, SBDM Council member, DuPont Leadership Process Trainer.

Honors and Awards

2011	Excellence in Education Award, AdvancED
2008	Fayette County Distinguished Service Award



Mark Quintana

Vice President, Southeast Region, Regional / State Services

Summary of Qualifications

Dr. Mark Quintana is a leader within K-20 education stemming for experiences as classroom educator, Magnet School Program/Curriculum Coordinator, K-12 Curriculum Administrator, School Improvement Administrator, and an Adjunct Professor for undergraduate through doctorate levels.

Professional Experience

2018–present **Vice President, Southeast Region, Regional / State Services, Cognia**

Lead, nurture, and facilitate continuous improvement initiatives in partnership with state departments of education, districts, and schools throughout the United States. Prior roles within organization were as Senior Director/Strategic Partnerships, Vice President/State Services, Vice President/Client Services.

2014–2018 **Senior Education Consultant, Sales, Promethean**

Managed large district implementations of a classroom interactive software initiative. Prior departments within organization were with Product and Consulting as Senior Education Consultant and Product Manager.

1996-2014 **School Improvement Coordinator, Service Quality Department, Broward County Public Schools**

Head of School Improvement Department responsible for facilitating schools' accreditation, school improvement plans, turnaround school initiatives, school advisory councils, school waivers to district policy and school recognition funding. Prior departments/schools worked within organization were School Improvement, Title I, Core Curriculum, Magnet, Palmview Elementary School, Northeast High School.

Education

Ed.D., Child and Youth Studies, Nova Southeastern University

Ed.S., Educational Leadership, Nova Southeastern University

M.Ed., Exceptional Student Education, Florida Atlantic University

B.A., Economics, State University of New York College at Oswego

Certifications

Professional Educator's Certificate, Florida:

Educational Leadership, K-12

Exceptional Student Education, K-12

Social Sciences, 6-12

Educational Media Specialist, K-12

Driver Education Endorsement

Honors and Awards

- | | |
|------|--|
| 2019 | Wilma Simmons Golden Service Award
Recognition to a member of the Florida Council for the Social Studies who has been active for many years and has made significant and lasting contributions to the council. |
| 2012 | Doyle Casteel Outstanding Leadership Award
Recognition for a minimum of five years' experience for continuous leadership in a supervisory or administrative capacity, and leadership in the Florida Council for the Social Studies for impact that has been made to promote cross-cultural understanding, the role played in mentoring classroom teachers, and advocacy for the importance of social studies education. |
| 2004 | Broward's Best
Award for leading innovative efforts for civics education to include partnership with Kids Voting Broward. |

Mark Quintana

Vice President, Regional / State Services

Publications and Presentations

Quintana, M. (2019). Compliance Monitoring, Technology Plan and the Alabama Annual Continuous Improvement Plan. Cognia Connect, Montgomery, AL.

Quintana, M. (2019). **Technology Plans and Compliance Monitoring**. Alabama Leaders in Educational Technology, Orange Beach, AL.

Quintana, M. (2019). **Compliance Monitoring**. Alabama Association of Federal Program Programs Conference, Montgomery, AL.

Searcy, L., Scott, J. and Quintana, M. (2019). **Alabama State Department of Education: Leveraging Cohesive Process Requirements in ESSA**. Chief Council of State School Officers School and District Improvement State Collaborative on Student Assessment & Standards, Los Angeles, CA.

Quintana, M. (2017). **Re-Imagining the Learning Workspace: Immersive Experiences & the New Age Learner**. Texas Computer Association Annual Conference; Austin, TX.

Quintana, M. (2017). **Teaching & Learning with the Technology Integration Matrix**. Texas Computer Education Association Annual Conference, Austin, TX.

Quintana, M. (2016). **Creating and Energized Learning Culture**. District Administrator Leadership Institute, Boston, MA.

Quintana, M. (2016). **Re-Imagining the Learning Workspace: Immersive Experiences & the New Age Learner**. District Administrator Leadership Institute, Orlando, FL.

Quintana, M. (2015). **Re-Imagining the Learning Workspace: Immersive Experiences & the New Age Learner**. District Administrator Leadership Institute, Colorado Springs, CO.

Krishnayer, L., Quintana, M., Ball, L. (2009). **Your Voice, Your Choice: Kids Voting Broward**. National Parent Teacher Association Convention. Ft. Lauderdale, FL.

Smiley, E., Quintana M. (2008). Smiley, E., Quintana, M., Carr, D. (2007) **Closing the Instructional Divide: A Collaborative Approach to Connecting Curriculum and Technology**. National Association of Black School Educators Annual Conference, Nashville, TN.

Smiley, E., Quintana, M., Carr, D. (2007) **Closing the Instructional Divide: A Collaborative Approach to Connecting Curriculum and Technology**. Council of Great City Schools Annual Conference; Nashville, TN.

Quintana, M. (2003). **Revising and evaluating a high school level School-to-Career transition curriculum**. Applied Dissertation. Nova Southeastern University.



Nicole Dominique Reeves

Senior Director, Professional Learning

Summary of Qualifications

Nicole Reeves serves as Improvement Services Director for Cognia. Nicole's education includes bachelor's degrees in both education and special education and both a master's and doctoral degree in Educational Leadership. Nicole assists institutions in all areas of professional learning and school improvement. An experienced trainer, presenter, and facilitator, Nicole has presented at several local, regional, and national conferences, including those hosted by AdvancED, Cognia, Louisiana Association of Principals, SACS/CASI, Associated Professional Educators of Louisiana, and National Catholic Education Association, and has trained and facilitated many active work sessions for teachers, administrators, and board-level personnel at all levels in various types of educational institutions. Nicole is a certified national trainer for Time To Teach and has vast educational experience in schools spanning 24 years, including teaching special needs students, 6th grade, and 1st grade before becoming curriculum coordinator/ librarian, assistant principal, and principal. To date, Nicole has 30+ years of experience in education.

Education

Ed.D. American College of Education

M.Ed., Educational Leadership, University of Louisiana

B.A., University of Southwestern Louisiana

Certifications

Educational Leadership Certification, Louisiana

Special Education, K-12, Louisiana

Regular Education, 1-8, Louisiana

Professional Experience

2022–present **Senior Director, Professional Learning, Cognia**

Partners, creates, and implements solutions of institutional improvement and professional learning for boards, school systems, and schools of various types. Coordinates and trains outside contractors to support Cognia's work in Improvement Services and Professional Learning. Serves on various organizational committees to create an articulated Theory of Action for Cognia and to create a leadership coaching and support program among other things.

2019–2022 **Director, Improvement Services, Professional Learning, Cognia**

Worked closely with regional directors, partner organizations, schools, and districts in support of Cognia's state, district, and schoolwork in these areas. Contributed to meaningful collaboration with Cognia colleagues to ensure quality service content and services for institutions. Utilized current educational knowledge, expertise, and extensive understanding of Cognia products, services, and solutions to successfully provide guidance, support, and recommendations for professional learning and/or training. Maintained excellent knowledge of state and federal program regulations, requirements, best practices, and current issues in education associated with continuous school improvement, accreditation, assessment, STEM, and early learning. Developed content within the Improvement services framework in support of relevant professional development needs of educators. Planned, led, and managed event delivery for meetings, conferences, and workshops in collaboration with Cognia's Improvement Services teams and partner organizations as needed. Implemented and ensured quality of professional learning by monitoring feedback and evaluations of professional development services provided. Conducted presentations and facilitates learning for conferences, workshops, and state/district/school level trainings.

2018–2019 **Specialist, AdvancED**

Assisted and consulted for school improvement related activities in schools/school systems. Provided customized training for schools/school

Nicole Dominique Reeves

Senior Director, Professional Learning

systems including but not limited to student engagement, stakeholder input, continuous improvement, data analysis and usage, formative assessment, and more.

2016–2018 School Quality Specialist, AdvancED

Coordinated training for schools, school systems, and lead evaluators for events related to accreditation and continuous improvement. Reviewed and edited Accreditation Engagement Review reports and Progress Assessment Reports for schools and school systems. Served as Lead Evaluator and/or team member for school/school system accreditation reviews. Assisted and consulted for school improvement related activities in schools/school systems. Provided customized training for schools/school systems including but not limited to student engagement, stakeholder input, continuous improvement, data analysis and usage. Completed organizational self-assessment and review for state office performance and customer service using stakeholder feedback from clients.

2014–present National Trainer/Educational Consultant for Time to Teach

2009–2016 Principal, Our Lady Immaculate Catholic School

2008–2009 Trainer, Excellence for Children

2007–2009 Assistant Principal, Sts. Leo-Seton Catholic School

2004–2007 Librarian, Sts. Leo-Seton Catholic School

1996–2004 First Grade Teacher, Sts. Leo-Seton Elementary School

1994–1996 Language Arts Teacher, Lafayette Middle School

1993–1994 Math/Language Arts Teacher, Lafayette Middle School

1992–1993 Special Education Teacher-Autistic Class, Lafayette Middle School

1989–1992 Teacher/Diagnostician, Sylvan Learning Center

Affiliations

2020-2021 Kappa Delta Pi, International Honor Society

Publications and Presentations

Reeves, N., et al. (Year) **Principals: “Thoughtful Approaches to Maximize Professional Learning Outcomes.”** Source, Cognia’s magazine.

Nicole Reeves is a distinguished and experienced presenter. Over the course of her career she has presented at events and directly to clients on multiple topics including the following:

- Creating Effective Learning Environments
- Instructional Strategies to Improve Student Learning
- Creating a Culture of Thinking with Effective Questioning
- Progress Monitoring and Feedback to Improve Student Learning
- Differentiate Instruction to Improve Student Learning
- Creating a Growth Mindset to Improve Student Learning
- Building a STEM Culture
- Cognia’s Continuous Improvement Process
- Strategic Thinking and Improvement Planning for Educational Leaders
- Tools to Support Continuous Improvement
- Preparing for the Accreditation Engagement Review
- Comprehensive and Targeted Support for School Improvement
- Implementing Cognia Formative Assessment Tools in the Classroom
- Data, Diagnosis, Action
- Identifying and Using Data for Decisions – School Consultation Series
- Planning for Intensive Improvement Action – System Consultation



Jeremy Stinson

Director, Regional/State Services

Summary of Qualifications

Dr. Jeremy Stinson is Cognia's Director for Mississippi and Arkansas. Jeremy joined the Cognia team having served in education for 24 years, most recently as Superintendent of Mississippi Schools for the Deaf and the Blind in Jackson. As superintendent, Dr. Stinson led two very distinct special needs schools with departmental oversight in special services, finance, operations, building and grounds, transportation, technology, residential, athletics, and outreach. He also has experience as a teacher, assistant principal, principal, administrative and teacher mentor, assistant superintendent, state director, student teacher advisor for Mississippi State University's Department of Curriculum and Instruction, and adjunct professor for the University of Mississippi's Department of Leadership and Counseling.

Education

Ph.D., Educational Leadership, The University of Mississippi

M.Ed., Educational Leadership, The University of Mississippi

B.A., Education, concentration: Math & Science, The University of Mississippi

Certifications

Mississippi

Administrator, K-12

Elementary Education, K-6

Gifted Education, K-12

Mathematics, 7-12

General Sciences, 7-12

Mild/Moderate Disabilities, K-12

Professional Experience

2024–present **Director, Southeast Region, Regional/State Services, Cognia**

Provides support through professional development and technical assistance to member schools and systems in their continuous improvement journey. Contributes to Cognia's professional learning opportunities for educational professionals to optimize success for every student. Maintains relationships with public, charter, and private schools and districts, providing guidance and technical assistance for all tools and resources included in Cognia membership as well as group and individual training and coaching in continuous improvement.

2021–2024 **Superintendent, Mississippi Schools for the Deaf and the Blind**

Comprehensive experience of leading two very distinct special needs populations. Successfully led district through the Cognia Accreditation Review with full accreditation during the 22-23 school year. District received the Cognia Value Driven Award for their hard work during the accreditation review. Department oversight includes special services, finance, operations, building and grounds, transportation, technology, residential, athletics, residential, and MSDB Low Vision, Audiological, and Health Clinics. Direct report to the MDE Chief Academic Officer, State Superintendent of Education, and the Mississippi State Board of Education, providing a wealth of knowledge, skills, and critical contacts for school districts.

2018–2021 **Director of Mississippi Instructional Resource Center & Ex-Officio Trustee, Mississippi Department of Education**

As the Director of Mississippi Instructional Resource Center served 450 students throughout the state who are visually impaired by providing braille and large print textbooks, equipment, and adapted materials. Served on the Mississippi Schools for the Deaf and the Blind (MSDB) Leadership Team. Manage state, IDEA, and federal quota accounts. Authored a Request for Proposals to procure complex braille textbook purchases. Organized and managed annual registration of all visually impaired students for the Federal Quota Program. Supervised MIRC employees to ensure timely and efficient

Jeremy Stinson

Director, Regional/State Services

distribution of textbooks and materials to all Mississippi school districts. Enrolled in Hadley Braille Institute Course and an American Sign Language class at the Mississippi School for the Deaf; MSDB Leadership Team and Transition Team Member.

2016–2018 University Supervisor, Mississippi State University

Supervised student teachers during their senior practicum. Evaluated student teachers with two formative and two summative evaluations, including pre-conference and post-conference feedback. Served as a mentor for pre-service teachers to ensure continuous improvement throughout the semester and instill an attitude of life-learning learning and professional growth.

2012–2017 Assistant Superintendent, Lafayette County School District

Supported administration and teachers in all aspects of curriculum and instruction including development, implementation, school-wide behavior management, intervention, programming, and textbook selection. Oversight of all aspects of state testing with fidelity as District Test Coordinator including test training, security, and administration. Facilitated district-wide professional development as Title II and III Coordinator. Hearing Officer for staff and students. Assisted with special education, accountability, accreditation, federal programs, and mentorship.

2012–2015 Adjunct Professor, The University of Mississippi

Taught in the Department of Leadership and Counselor Education for the doctoral EDLD 750 course and for Master's leadership courses EDLD 674 and 650.

2003–2012 Principal/Assistant Principal, Batesville Intermediate School

Instructional leadership. School-wide behavior management and intervention. Facilitated staff development. TST member. Parent consultation. Scheduling. Textbook management. IEP committee member. Managed all normal operations of school.

1999–2003 Seventh and Eighth Grade Integrated Science Teacher, Pope Elementary and Junior High School

Motivated students to perform at highest academic capabilities. Teamwork with colleagues to develop innovative approaches in classroom instruction and management. Highly organized, positive, effective environment. Worked closely with administration and parents to solve problems. Interned with principal during Master's preparation.

Honors and Awards

2013-2014	MSBA Prospective Superintendent's Academy Graduate
2011-2012	Employee of the Year, Batesville Intermediate School
2003	Forrest W. Murphey Award in K-12 Leadership, The University of Mississippi
2000-2001	Teacher of the Year, Pope School
1999	Chancellor's Honor Roll,
1997	Phi Theta Kappa Scholarship
1995	Lamar Scholarship
1995	June S. Gardner Scholarship

Affiliations

1999-present	Mississippi Professional Educators
1999-present	Phi Kappa Phi
1999-present	Kappa Delta Pi
1997-present	Phi Theta Kappa

Jeremy Stinson

Director, Regional/State Services

Publications and Presentations

Stinson, Jeremy E., (2011) *The Impact of Pre-K Programs on Student Achievement and Instructional Leadership in Rural Mississippi School Districts*. Electronic Theses and Dissertations. 273.
<https://egrove.olemiss.edu/etd/273>



Lisa Stone

Senior Vice President, Professional Learning

Summary of Qualifications

Dr. Lisa Stone has a long history in the field of education, having spent time at both the classroom and at the administrative levels. Lisa has expertise in continuous improvement processes that result in success for learners and educators.

Professional Experience

2022–present **Senior Vice President, Professional Learning, Cognia**

Lisa leads the Professional Learning team in providing meaningful professional learning experiences for educators. She engages with clients and staff to ensure professional development opportunities are customized to meet needs, support school and classroom practice and impact learners.

2018–2022 **Senior Vice President, Improvement Services, Professional Learning, Cognia**

2018–2019 **Vice President, Improvement Services, Cognia**

2016–2018 **Director, Kentucky, AdvancED (now Cognia)**

2013–2016 **Associate Director, Kentucky, AdvanceED**

2011–2013 **Director of School Improvement, Montgomery County Schools**

Led principal and district administrator learning and growth. Developed curriculum, instruction, and assessment materials to align with Kentucky Core Academic Standards. Led charge to take district from Kentucky ranking of 132 to top ten.

2007–2012 **Consultant, Kentucky Association of School Councils**

Consulted with Union County Schools on a regular basis to climb from 161 to 52. Worked with Bedford Elementary School on a regular basis to make a 10-point gain in one year. Consulted with numerous districts and schools to improve student achievement. Researched and developed professional development on relevant topics such as formative assessment, constructed response, professional learning communities, and response to intervention.

2006 **Acting Superintendent, Fayette County Public Schools**

Fulfilled all responsibilities of superintendent.

2004–2007 **Elementary School Director, Fayette County Public Schools**

Supervised and directed twelve elementary principals and schools. Facilitated the work of all instructional directors. Advised superintendent on all district decisions including curriculum, instruction, assessment, finance, facilities, technology, public relations, and human resources. Guided SBDM councils throughout the principal selection process. Directed Title One and pre-school programs. Led implementation of grassroots initiatives such as One Community One Voice and Academic Challenge.

Education

Ed.D, University of the
Cumberlands

M.A., Elementary Education,
Eastern Kentucky University

B.A., Elementary Education,
University of Kentucky

Certifications

Standard Elementary
Teacher Certification, grades
1-8

Supervisor of Instruction
Certification

Elementary and Middle
School Principal Certification

Superintendent Certification

Rank One in Administration

Lisa Stone

Senior Vice President, Professional Learning

2002–2004 Director of Student Achievement, Fayette County Public Schools

Directed most district programs including Title One, gifted and talented services, magnet program, pre-school, data and research, career/technical programs, SAFE Schools, English as Second Language, District Assessment Coordinator, and high school academic deans. Supervised staff of over 100 personnel; associate directors, coordinators, curriculum specialists, and support staff. Facilitated professional and leadership development for administrators and teachers. Planned and facilitated all monthly administrators' meetings for 150 people. Coordinated the development of and implemented district improvement plan. Wrote board policy for compliance.

2001–2002 Associate Director of Student Achievement, Fayette County Public Schools

Administered Title One, pre-school, English as Second Language, District Assessment Coordinator, career/technical programs, and Extended School Services. Supervised eleven content specialists and over seventy-five certified and classified staff members. Developed district plan to provide intentional support for schools to increase student achievement.

1997–2000 First Principal of Rosa Parks Elementary School Fayette County Public Schools

Hired all teachers and support staff. Attended all construction meetings to make critical building decisions. Established curriculum and instructional practices through teacher teams.

1994–1997 Principal of Linlee Elementary School, Fayette County Public Schools

Led the school from decline to rewards, making one of the highest gains in Kentucky.

1990–1994 Principal of Fannie Bush Elementary School, Clark County Schools

Implemented initial phases of the Kentucky Education Reform Act (KERA). Led the school to rewards in the first biennium of KERA.

1983–1990 Teacher (Grades 1-7), Clark and Powell County Schools

Served on district's middle school steering committee.

Tab 3 – References

Must meet the requirements as set forth in the References section. (See Section 3)

Cognia provides three references on the RFP-provided Appendix C form within this section. Our clients are our strongest advocates, and they will attest to the quality of our work and our proven track record in driving continuous improvement. These references showcase how our long-term collaborations have achieved sustained, measurable results. To verify our qualifications and learn more about their positive experiences, we encourage you to connect directly with these clients. Additionally, we provide a summary of our work with each reference organization before the form.

Alabama State Department of Education

The Alabama State Department of Education (ALSDE) adopted the research based Cognia Continuous Improvement Model to lead and support schools and districts statewide to improve outcomes regardless of academic achievement. Looking to improve outcomes for all students, ALSDE embarked on a mission to support schools and systems in developing Alabama Continuous Improvement Plans (ACIPs). The framework outlines the steps to develop an effective continuous improvement plan that can articulate short (1 year) and long-term (up to 5 years) objectives and strategies. Cognia then helps districts implement their plans through programs of customized professional learning backed with digital resources, such as observation tools and surveys, that yield multiple data sources to measure success. ALSDE reports an uptick in stakeholder engagement and more focused conversations about goals and equitable outcomes since implementing Cognia's framework and tools.

North Dakota Department of Public Instruction

Cognia partners with the North Dakota Department of Public Instruction to implement a research-based system of continuous improvement and accreditation for all North Dakota schools and districts. The Cognia Standards for Quality and Systems Accreditation are embraced statewide as the foundation for continuous improvement efforts. Among the many benefits of partnership, NDDPI's collaboration with Cognia has yielded

- an unwavering focus on continuous improvement, student performance, and stakeholder satisfaction.
- a system for incorporating external evaluation and feedback for all North Dakota institutions.
- a framework and support system to help schools meet and exceed state and national requirements.
- a common method for reporting on every school in the state, allowing for a uniform comparison among school and districts.

- ways to disseminate shared learning at regular intervals through annual school improvement conferences,
- ongoing professional development, regional workshops, accreditation readiness training, and peer-to-peer learning programs.

Forest Municipal School District, Mississippi

Cognia is currently engaging with Forest Municipal School District in Mississippi to create their Strategic Plan. This partnership includes conducting focus group interviews; facilitating the first three phases of Cognia's strategic thinking and planning process; coaching for effective engagement of district staff, identified improvement team leaders, and participants; and guiding the district to complete a five-year strategic plan. In fall 2024, Cognia began planning with Forest Municipal leaders to implement the services outlined in our statement of work. On November 7, 2024, Cognia facilitated focus group interviews for three separate stakeholder groups: students, families and community, and teachers.

The Cognia Improvement Specialist shared a report of findings with the district. That report was later used during the Envisioning Phase as another data source to determine the district's current reality. Cognia facilitators conducted planning meetings with district leadership to plan upcoming sessions, discuss logistics, and resources needed. In December, Cognia Improvement Specialists facilitated the work outlined in our Envisioning Phase with those stakeholder representatives identified by the district to share in the decision-making process. To date and under the guidance of Cognia Improvement Specialists, district leaders and representatives have completed the Envisioning phase, resulting in identification of three strategic themes (areas of focus) and updated vision, mission, and belief statements. During February 2025, the district will complete the Planning phase, during which the long-term objectives and critical initiatives that will guide Forest Municipal over the course of the next five years will be documented.

Appendix C - References

Client Name	Alabama State Department of Education
Contact Name and Title	Dr. Molly Killingsworth, Director of Federal Programs
Contact Address	50 N Ripley St, Montgomery, AL 36104
Contact Telephone Number	334-694-4711
Email Address	mkillingsworth@alsde.edu
Type of work provided to the client	Various continuous improvement initiatives. Further details are provided in our proposal.
Effective contract dates for the time frame services were/are being provided to client	2012-Present

Client Name	North Dakota Department of Public Instruction
Contact Name and Title	Arlene Wolf, Assistant Director, School Approval & Opportunity
Contact Address	600 E Boulevard Ave # 201, Bismarck, ND 58505
Contact Telephone Number	(701) 328-2295
Email Address	arlenewolf@nd.gov
Type of work provided to the client	Various continuous improvement initiatives. Further details are provided in our proposal.
Effective contract dates for the time frame services were/are being provided to client	2013 - Present

Client Name	Forest Municipal School District
Contact Name and Title	Dr. Melanie Nelson, Superintendent
Contact Address	325 Cleveland St, Forest, MS 39074
Contact Telephone Number	601-469-3250
Email Address	mnelson@forest.k12.ms.us
Type of work provided to the client	Strategic planning services. Further details are provided in our proposal.
Effective contract dates for the time frame services were/are being provided to client	2024 - Present

Component 3 – Price

Tab 4 – Price/Budget

Vendor should provide line-item cost detail for all deliverables identified.

The costs associated with the work outlined in this proposal are detailed in Exhibit 17 below. Travel is included for all onsite visits.

Project Phase	Deliverables	Line-Item Cost
Project Work Plan	20 hours project preparation, Project Work Plan	\$4,000
SWOT Analysis and Environmental Scan Report	1 Facilitator, 2 days onsite, additional virtual coaching	\$13,800
Stakeholder Engagement Plan	Focus Groups, Forums, Surveys	\$20,000
Draft Strategic Plan and Performance Scorecard	Draft Plan and Scorecard Prep	\$30,000
Final Strategic Plan and Performance Scorecard	Final Plan and Scorecard	\$10,000
Final Presentation and Training by October 1, 2025	1 Facilitator, 1.5 days onsite	\$12,600
Implementation Roadmap	1 Facilitator, 2 days onsite, additional virtual coaching	\$13,800
Monitoring and Reporting Protocols	1 Facilitator, 2 days onsite, additional virtual coaching	\$13,800
	Total	\$118,000

Exhibit 17. Cost Proposal.



Component 4 – Other

Tab 5

Any additional relevant information (not to exceed five (5) pages).

Showcasing the New Strategic Plan in Bay District (FL)

Cognia facilitators led Bay District Schools leaders through Cognia’s Envisioning, Planning, and Implementing Phases to create a long-term strategic plan. District leaders asked Cognia to present the process and the plan to their school board at a workshop to give board members a better understanding of the plan and how the plan was created. To watch a video about the results of our engagement with Bay District Schools, see:

<https://www.youtube.com/watch?v=UoMNGbadiXM>

Participant Feedback from Forest Municipal School District (MS)

Following the completion of our engagement with Forest Municipal School District, we asked members of their strategic planning team to complete a survey to gauge their satisfaction with the process and gather feedback for our own continuous improvement efforts. Aggregate survey results are presented in Exhibit 18, followed by quotations from participants about their experience with Cognia.

Forest Municipal

12/17/23

17 responses

On a 1-4 scale

This professional learning session was engaging and captured my interest.

Average: 3.8



The format and flow of the session supported the stated purpose or outcomes.

Average: 3.8



The session met my learning expectations.

Average: 3.9



The learning included relevant connections to my work.

Average: 3.9



As a result of this opportunity, I have improved knowledge and skills to implement what I learned in my current practice.

Average: 3.8



This professional learning opportunity was a worthwhile investment of my time.

Average: 3.8



The facilitator was knowledgeable about the content and any related topics.

Average: 3.9



The facilitator modeled best-known practices and engagement strategies for learning.

Average: 3.8



The facilitator was well organized and prepared.

Average: 3.9



Exhibit 18. Survey results from Bay District, Florida.

What were the specific areas of strength in this professional learning session?

- Attendee engagement
- The hands-on and collaboration
- Provided an awesome opportunity for collaboration.
- Collaboration
- Facilitators were engaged
- The session provided a safe space for all stakeholders to collaborate.
- Structured planning
- I would recommend Cognia in a heartbeat!
- Providing a collaborative for all facets to respond.
- Facilitation and actively engaging all participants
- Not only were they knowledgeable, but they were engaging and personable. It was a pleasure to work with them. The collaboration of the mission statement
- The collaboration and expert guidance in developing the strategic plan.
- I think that everything was broken down in any easy-to-read format.



Tab 6

Signed Contingent Fee/Acknowledgement of Amendments, if applicable.

We have included all required forms and signed amendments in this section.

As previously indicated on our signed Proposal Cover Sheet, Cogna is in agreement with the Standard Terms and Conditions outlined in the solicitation.



Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror’s proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Mark A. Elgart

Title: President and CEO

Signature: Mark A. Elgart Date: 1/30/2025

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

_____ Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

✓_____ Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	
Contract Dates of Service	



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).

1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education’s Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Mark A. Elgart
Authorized Signature

1/30/2025
Date

Mark A. Elgart
Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Mark A. Elgart
Authorized Signature

1/30/2025
Date

Mark A. Elgart
Printed Name

Strategic Planning and Performance Scorecard

RFX No. 3120003047

ILO Group – Proposal

**Strategic Planning and Performance Scorecard for the Mississippi Department of
Education**

RFX No. 3120003047 – ILO Group – Proposal

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Cover Letter

Appendix A – Proposal Cover Sheet

Company/Name: ILO Group LLC

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Cerena Parker, COO
Mailing Address	10 Dorrance Street, Suite 700
City, State, Zip	Providence, Rhode Island 02903
Telephone:	305-202-2410
E-Mail Address:	cparker@ilogroup.com

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? ____ YES ___X_ NO
2. If known, what is your supplier number? _____
3. Are you currently registered with PayMode? ____ YES ___X_ NO
4. Are you a minority owned company? ____ YES ___X_ NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: Cerena Parker Date: January 27, 2024

February 5, 2025

Mississippi Department of Education
State Board of Education Strategic Planning and Performance Scorecard
RFX# 3120003050
359 North West Street
Jackson, Mississippi 39201

To Whom It May Concern,

On behalf of ILO Group, I am pleased to submit our proposal in response to RFX No. 3120003047 for the State Board of Education Strategic Planning and Performance Scorecard. My name is Cerena Parker, and as an authorized representative of ILO Group, I am legally authorized to bind the organization to this proposal submission. We are excited about the opportunity to partner with the Mississippi Department of Education to support their strategic planning and creation of a performance scorecard.

Our contact information is provided below for any further communication:

Mailing Address:

ILO Group
10 Dorrance Street, Suite 700
Providence, RI 02903

Email Address: cparker@ilogroup.com; Phone Number: 305-202-2410

We are excited about the opportunity to collaborate with you on strategic planning and the development of a performance scorecard to drive impactful results. Please feel free to reach out if you require any additional information during your review process.

Sincerely,



Cerena Parker, Chief Operating Officer
ILO Group

Component 1 - Plan of Action

Tab 1 - Detailed Service Plan

Introduction

ILO Group is honored to submit this proposal to the Mississippi Department of Education (MDE) to provide comprehensive strategic planning and performance scorecard development services. We understand that MDE seeks a data-driven, stakeholder-informed strategic plan that aligns with the state’s education priorities while ensuring broad engagement, measurable impact, and sustainable implementation.

With extensive experience supporting state education agencies and school districts nationwide, ILO Group specializes in guiding leadership teams through complex strategic planning processes. Our approach is scaffolded, iterative, and collaborative—ensuring that stakeholders contribute meaningfully at every stage while decisions are rooted in data.

About ILO Group

Today's education leaders are facing unprecedented and increasingly complex challenges – and the stakes have never been higher. At ILO Group, we believe in the power and importance of leaders in moving the needle. We also believe that for leaders to succeed, they must be supported in their work.

ILO Group is a proudly women-owned education strategy and advocacy firm. We are a dedicated team of strategic partners and specialists who support school districts and states in executing their biggest bets and their highest priority efforts. Our name, ILO Group, stands for In the Life Of: we work as members of our partners’ teams—operating side-by-side with the country’s leading educators, experts, and government partners.

Our work is as diverse as our partners' ambitions are bold: we provide leadership development, comprehensive project management and implementation support, systems transformation, and more. We enable education leaders to be the catalyst for enduring change that benefits their students, schools, and communities. We’ve proudly supported state and district leaders who serve 1 in 3 students in America.

Company Details

ILO Group has supported school districts, state education agencies, and systems leaders since its incorporation in 2021. Our CEO, Julia Rafal-Baer, and Chief Operating Officer, Cerena Parker, are co-owners of the company.

Over the past five years, ILO Group has maintained an average of 15 employees, with more than two dozen subject matter experts, supporting consultants, and Chiefs in Residence who allow us to expand as needed to meet the evolving needs of our partners. With decades of collective experience, our seasoned team of consultants has supported many of the nation's largest and highest-profile school systems and education-focused organizations.

ILO Group maintains a mailing address in Providence, Rhode Island, but operates in a fully virtual environment. This structure enables our consultants to live and work remotely across the country while traveling frequently to support clients on-site, ensuring a deep and hands-on partnership with the organizations we serve.

Why ILO Group

We have extensive experience in providing hands-on technical assistance tailored to leaders' and systems' unique geographic, political, and economic realities. Our seasoned experts have helped guide entire teams within systems through strategic planning, pandemic recovery, leadership transitions, new initiatives, and unexpected challenges. We take a thoughtful, empathetic, and data-informed approach to help our clients articulate and achieve their ambitious goals. Our customized solutions are practical, responsive, and effective, ensuring that our clients receive the support they need to succeed.

ILO Group partners with school systems and their leaders to guide their strategic planning processes. We collaborate closely with our clients to provide ongoing project management, oversight, and execution support, as well as continuous coordination with key stakeholders at every stage. Our approach emphasizes collaboration and engagement with the education systems' leadership and their teams, with active input from the board and stakeholders representing MDE staff, Mississippi families and students, and community partners to ensure the plan reflects the views and needs of the state.

Strategic planning is our specialty.

We have worked with school districts and state education agencies from across the United States to design and launch student-centered, stakeholder-driven strategic plans that reflect the goals and values of each system's unique ecosystem. Our approach blends data analysis

and reflective inquiry, deep stakeholder engagement that fosters future-focused conversations, and a process grounded in research on improving student outcomes. With each strategic planning project we support, we bring a team of experts with backgrounds that span from teacher to principal to the superintendency, with skill sets ranging from data analytics to stakeholder engagement. We prioritize collaboration, empowering all voices to contribute to a shared vision for success. A few examples of our people-centered, data-informed approach are below:

- ILO Group **supported a State Education Agency with the drafting of strategic goals, strategies, and outcomes for their newly released strategic plan.** ILO Group created the structure and outline of the plan and provided technical assistance in supporting agency staff in developing clear and SMART outcomes associated with each agency strategy. ILO also facilitated the launch and rollout of the strategic plan with staff across the state, including instructions for action planning and the building of department-level associated goals and actions.
- ILO Group **conducted a meta-analysis across student data, a community-wide survey with approximately 2,000 responses, and a dozen focus groups to develop a 75-page report for a school district** detailing our findings and providing recommendations for the upcoming strategic plan, specifically highlighting gaps in performance between student groups over time in relation to services provided at various grade levels. This report served as the foundation for the district's development of its goals and associated priorities and measurable targets.
- ILO Group **facilitated collaboration between district leadership and community stakeholders to align the district's strategic plan goals with the community's needs.** By centering student success and leading targeted engagements, the district was enabled to develop a cohesive, actionable plan that ensures accountability and sustainability for lasting improvement across the district.
- ILO Group **provided department-level strategic planning support for the Office of Student Support Services to align with the district's five-year plan,** including the establishment of strategic priorities, measurable goals, and targeted initiatives. We also provided robust, large-scale implementation support to the district to roll out one of its primary initiatives, including communication collateral and data analysis support.

Our team has a depth of expertise in stakeholder engagement.

Stakeholder engagement is the cornerstone of our team's approach. As a foundational step, we believe that thorough engagement helps solidify a full understanding of problems to be solved. Further, to ensure that potential solutions are truly responsive to core issues and are pragmatic in application, we believe that ongoing engagement with stakeholders aids in properly pressure-testing solutions before they are implemented. In addition, we place a strong emphasis on engaging with key stakeholders and have facilitated workshops aimed at breaking down cross-district and cross-departmental silos. These efforts have strengthened key initiatives and ensured that solutions are responsive and practical. We believe that

stakeholder buy-in is crucial to the long-term success of any strategic plan, and our engagement with stakeholders has helped to achieve this in many varying contexts.

- ILO Group **led the design and execution of a “Community Design Day” where nearly 100 members of the community attended to provide input on the district’s future priorities to inform the development of the strategic plan.** As part of this work, our team trained their district leaders and board members in stakeholder engagement, coaching them to facilitate across various groups to solicit feedback on the strategic plan. Following the event, which included print and television media coverage, 100% of attendees surveyed indicated they felt that they had meaningfully contributed to the district’s strategic plan and would attend future district events.
- ILO Group serves as the **strategic project managers and thought partners for a state education agency to support districts in the implementation of a four-year initiative focused on engaging with community stakeholders** and building organizational structures to deliver the schools that families want and need. Our support includes extensive district data analysis, stakeholder engagement, school action planning, and building systems and processes for continued progress monitoring.

Our team has expertise in delivering projects within school districts and state education agencies that "stick."

Our proposed project team comprises members with extensive experience in K-12 education, including state leaders and seasoned managers. We understand the critical importance of this work and have a strong track record of successfully navigating the state education landscape and collaborating across stakeholder groups. Our goal is to deliver solutions that have staying power and exceed the expectations of project stakeholders. With our team's deep expertise and commitment to quality, we are confident in our ability to make a meaningful and lasting impact.

- ILO Group **developed strategic planning toolkits and roadmaps for a state education agency to distribute to district and school leaders embarking on school transformation.** To develop the 150 pages of strategic planning materials, we conducted nearly 20 interviews with schools across the state and leading schools across the nation who had successfully redesigned their secondary systems. Moving forward, the SEA will use these materials to elevate its focus on school transformation and provide districts and schools with the tools, guidance, and resources necessary to transform schools.

We have served as trusted advisors for education superintendents and cabinet members across the country and deeply understand the challenges faced by district leaders.

We have led a portfolio of projects with school systems across the country, providing custom strategic planning, project management, and technical assistance services aligned with each system leader's strategic vision and goals. **We have proudly supported leaders who serve one in three students in America.**

Component 2 - Administration

Tab 2 - Resumes

Key Personnel

We are excited to bring a team of former superintendents, educators, system leaders, and seasoned consultants to support the Mississippi Department of Education. Our team has a track record of successful projects and has led and supported a variety of organizations, from small districts to large government agencies.

Proposed Team

ILO will utilize a team of experienced leaders and consultants to ensure the highest quality of service delivery to MDE.

Executive Julia Rafal-Baer CEO and Founder, ILO Group	
Project Lead Ashley Gardiner Gilson Director, ILO Group	Subject Matter Expert Dr. Arsenio Romero Superintendent-in-Residence, ILO Group Former Secretary of the New Mexico Public Education Department
Project Manager Alexandra (Peña) Edmonds Senior Consultant, ILO Group	Consultant Vincent Rossmeyer Consultant, ILO Group Policy Director, Cowen Institute at Tulane University

The following information details the most relevant aspects of each proposed team member's resume.

Dr. Julia Rafal-Baer

Chief Executive Officer and Co-Founder, ILO Group

Julia Rafal-Baer, Ph.D., has dedicated her career to helping all children achieve their potential. After beginning her career as a special education teacher in the Bronx two decades ago, Dr. Rafal-Baer is now a top education advisor who leads high-performance, high-impact organizations nationwide. She is a trusted confidante to the nation's most effective state education leaders and superintendents, directly coaching more than 75 leaders into the superintendent and state commissioner roles, 80 percent are leaders of color and 65 percent are women. Dr. Rafal-Baer frequently speaks and writes on the need to advance more women leaders in senior roles.

Dr. Rafal-Baer is the co-founder and CEO of ILO Group, a women-founded, leadership-focused education policy and strategy firm. She is also the founder and CEO of Women Leading Ed, a national network of women education leaders, and a co-founder and partner at The Forum for Educational Leadership. During the Covid-19 pandemic, Dr. Rafal-Baer served as a top education advisor to school districts and state education agencies across the country and as an expert advisor to the COVID Collaborative. She also supported a national effort during the pandemic to safely reopen schools, accelerate learning, and strengthen critical support for students.

Previously, Dr. Rafal-Baer served as Chief Operating Officer at Chiefs for Change, a nationwide network of district and state education leaders. She built the organization from a start-up to a high-impact nonprofit, raising over \$110M in philanthropic funds, and developing core programming and initiatives, including the Future Chiefs and Women in Leadership program. She provided intensive technical assistance, direct systems support, coaching, and strategic advising support to state and district leaders and their leadership teams across the nation on topics including strategic planning, policy changes, finance and operations, school improvement, human capital, crisis management, and organizational development.

Dr. Rafal-Baer served as Assistant Commissioner of the New York State Education Department under Commissioner John B. King, Jr, where she was responsible for the strategy, management, and implementation of teacher and leader initiatives, overseeing more than \$150M in federal funds. She currently sits on the national board for the Association of Marshall Scholars; the Education Week Board of Directors; and the advisory committee for the Center for Education Policy and Research at Harvard University. In 2020, Dr. Rafal-Baer was appointed by the U.S. Secretary of Education to a four-year term on the National Assessment Governing Board, and in 2024, she was re-appointed to a second term. Her appointments, which span administrations from both

Democratic and Republican leadership, reflect broad, bipartisan recognition of her expertise and dedication to improving education outcomes. In 2022 she was named a Pahara Fellow.

Education

Dr. Rafal-Baer graduated summa cum laude from the George Washington University with a B.A. in Psychology and holds a dual M.S. from CUNY: Lehman College in Special Education and Childhood Education. She also holds a Master of Philosophy in Education Research, and a Ph.D. focused on comparative education policy from the University of Cambridge, where she was a Marshall Scholar.

Dr. Arsenio Romero

Superintendent-in-Residence, ILO Group

Former Secretary of the New Mexico Public Education Department

Dr. Arsenio Romero is a native New Mexican with 28 years of experience in education. His career has been marked by a steadfast commitment to fostering academic excellence and holistic student development from early childhood through higher education. Beginning as a dedicated teacher, Dr. Romero quickly emerged as a leader within the educational community in the border region. His tenure as a superintendent and principal was characterized by his championing of forward-thinking educational policies and practices. He was named the 2019 National Superintendent of the Year by the Association of Latino Administrators and Superintendents. Most recently, as the Secretary of New Mexico Public Education, Dr. Romero brings his wealth of experience and passion for education to the forefront, advocating for policies that uplift educators and students alike while continuing to inspire positive change and meaningful progress.

Dr. Romero's dedication to education is also deeply rooted in his own academic journey and his unwavering commitment to building leaders. He earned his BA in Education from New Mexico State University, followed by an MA in Educational Administration from the University of New Mexico, and ultimately, a PhD in Educational Leadership at NMSU. His commitment to education and leadership extends beyond his studies, as he served on the NMSU board of regents and taught educational leadership. Through these roles, Dr. Romero recognizes the importance of research, community and global partners, strong relationships with community and staff, and a learning environment that supports positive student outcomes.

As a former state superintendent with extensive experience leading state-wide initiatives, Dr. Romero will serve as the lead advisor and subject matter expert. She will provide high-level guidance on refining the strategic plan, fostering stakeholder engagement, and enhancing leadership capacity. Dr. Romero will directly coach leaders, support workshops, and ensure that best practices in continuous improvement and systematic evaluation are embedded to drive sustainable growth and student success.

Ashley Gardiner Gilson

Director, ILO Group

Ashley Gardiner Gilson has significant experience in analysis, design, and program management, which spans a range of domestic and international cradle-to-career education efforts. At ILO Group, Ashley manages and supports a diverse portfolio including long-range strategic planning for district and state systems.

Before joining ILO Group, Ashley served as the Senior Advisor for an international NGO where she oversaw the launch of career and technical education programs for underserved adults, including migrants and refugees, with a specific focus on accelerating opportunities for women.

Domestically, Ashley has supported various education-to-career initiatives. At the Council of Chief State School Officers, where Ashley spent a collective seven years supporting a variety of high-impact multi-state programs, she managed the New Skills for Youth initiative, a 35 million-dollar investment to transform education-to-career pathways across ten states. At America Achieves Ashley led the labor market analysis on behalf of the organization’s university and industry partners to develop prototypes for credit-bearing, non-degree pathways to accelerate people into high-demand, high-opportunity jobs with family-sustaining wages.

Ashley earned a bachelor’s degree in sociology and dance performance from Elon University and a master’s in public policy from Duke University’s Sanford School of Public Policy.

As the project lead, Ashley will oversee all aspects of the strategic planning support, managing key touchpoints and ensuring alignment with project goals. She will lead interviews, coordinate stakeholder engagement, and facilitate regular check-ins to drive progress. With her expertise in program management and strategic planning, Ashley will ensure that deliverables are met and that continuous improvement frameworks are effectively implemented to enhance district outcomes.

Alexandra (Peña) Edmonds

Senior Consultant, ILO Group

Alexandra (Peña) Edmonds is a dedicated policy professional at ILO Group and primarily focuses on providing technical assistance to chiefs and their teams in developing and implementing district or state-specific plans and projects.

Alexandra has over 6 years of experience working closely with Congressional and education leaders in a bipartisan manner to advance innovative policy ideas and initiatives. Before joining ILO Group, she served as a member support associate with Chiefs for Change, where she provided technical assistance to education leaders and their teams in developing and implementing city or state-specific policies, research plans, and other projects. Previously, she served as a special assistant to the U.S. Secretary of Education, helping to advance a range of policy priorities including building employer-education partnerships, promoting skills-based hiring strategies, expanding school choice opportunities, strengthening teacher recruitment and retention efforts, and managing relationships with key stakeholders. Alexandra’s previous experience also includes her time at bipartisan, bicameral government affairs consulting firm and multiple bipartisan legislative internships with members of Congress and congressional committees.

Alexandra holds a Bachelor of Arts in public policy leadership with honors from the Trent Lott Leadership Institute at The University of Mississippi.

With extensive experience developing systems and progress monitoring protocols for strategic plans, Alexandra will help implement continuous improvement frameworks that guide the Mississippi Department of Education in making progress. Alexandra will also facilitate focus groups to gather community input, ensuring the district’s initiatives are responsive and effective.

Vincent Rossmeier

Consultant, ILO Group

Policy Director, Cowen Institute at Tulane University

Vincent Rossmeier has worked with ILO Group for nearly four years. He has over 15 years of experience in education policy, writing, design, and research experience in a variety of industries. In addition to his consulting work, he serves as the Policy Director for the Cowen Institute at Tulane University, an organization dedicated to monitoring public education in New Orleans. In that role, he has served as the chief researcher of the think tank, which publishes annual reports on the state of education in the city, including evaluations of schools. At the Cowen Institute, he helped launch an Earn and Learn apprenticeship program for New Orleans high school graduates who could study and work at Tulane after graduating from high school. He also co-led a data collaborative that helped to evaluate district-wide data with NSC data from high schools across the city. Annually, he is the chief author of a report on public polling of parents about their perceptions of the education system in the city.

Additionally, as a consultant, he has worked on planning at every level of education -- from pre-K to post-secondary. His pre-K experience includes research and analysis of early child care and education (ECE) programs in New Orleans for Agenda for Children, as well as data and research analysis of Louisiana ECE initiatives for The Louisiana Policy Institute for Children. He authored reports on ECE data for both organizations. He also was a member of national organizations such as the National College Achievement Network, which focuses on post-secondary success.

He holds a Bachelor's Degree in History from the University of Virginia, as well as a Post-Bac in Graphic Design from Tulane University's School of Professional Advancement.

Vincent's experience in systems-level initiatives and hands-on K-12 work will support the Mississippi Department of Education's data-informed strategic planning and stakeholder engagement. Vincent will leverage his skills in consulting, research, and evaluation to align the state's efforts with community needs, as well as continuous improvement. Vincent will also assist in data-driven decision-making to enhance district outcomes and growth.

Tab 6 - Signed Contingent Fee/Acknowledgement of Amendments

- (1) Acknowledgement of Amendments**
- (2) Assurances and Certifications**
- (3) Release of Public Records**
- (4) Contracts**
- (5) Registration with Secretary of State**
- (6) Certificate of Good Standing**

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

- 4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: *This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

2/4/25

Date

Cerena Parker

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Cerena Parker _____

Title: COO _____

Signature:  _____

Date: 2/5/25 _____

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. *An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.*

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor's current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror's proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

F0200
Fee: \$ 250



Michael Watson
SECRETARY OF STATE

2025071488

Business ID: 1474966
Filed: 02/03/2025 03:21 PM
Michael Watson
Secretary of State

P.O. BOX 136
JACKSON, MS 39205-0136
TELEPHONE: (601) 359-1633

Application to Register Foreign Limited Liability Company

Business Information

Business Type: Limited Liability Company
Business Name: ILO Group, LLC
Business Email: cparker@ilogroup.com
State of Incorporation: RI
Date Organized: 03/04/2021

NAICS Code/Nature of Business

541611 - Administrative Management and General Management Consulting Services

Principal Office Address: 304 Pecan Ridge
Matthews, NC 28104

Registered Agent

Name: C T CORPORATION SYSTEM
Address: 645 LAKELAND EAST DRIVE STE 101
FLOWOOD, MS 39232

Signature

The undersigned certifies that:

- 1) he/she has notified the above-named registered agent of this appointment;
- 2) he/she has provided the agent an address for the company, and;
- 3) the agent has agreed to serve as registered agent for this company

By entering my name in the space provided, I certify that I am authorized to file this document on behalf of this entity, have examined the document and, to the best of my knowledge and belief, it is true, correct and complete as of this day **02/03/2025**.

Name:
Cerena Parker
Member

Address:
304 Pecan Ridge
Matthews, NC 28104



State of Rhode Island
Department of State | Office of the Secretary of State
Gregg M. Amore, Secretary of State

CERTIFICATE OF GOOD STANDING

I, Gregg M. Amore, Secretary of State and custodian of the seal and corporate records of the State of Rhode Island, hereby certify that:

ILO Group, LLC

is a Rhode Island Limited Liability Company organized on **March 04, 2021**.

I further certify that revocation proceedings are not pending; articles of dissolution have not been filed; all annual reports are of record and the company is active and in good standing with this office.

This certificate is not to be considered as a notice of the company's tax status, financial condition or business practices; such information is not available from this office.



SIGNED and SEALED on

January 30, 2025

Secretary of State

Certificate Number: 25010121480

Verify this Certificate at: <http://business.sos.ri.gov/CorpWeb/Certificates/Verify.aspx>

Processed by: dantonelli

PROPOSAL FOR:

Mississippi Department of Education

STRATEGIC PLANNING AND
PERFORMANCE SCORECARD
RFP NO. 3120003047

SUBMITTED BY:

BERRY, DUNN, MCNEIL & PARKER, LLC
2211 Congress Street, Portland, ME 04102

Charlie Leadbetter

Engagement Principal
Berry, Dunn, McNeil & Parker, LLC
cleadbetter@berrydunn.com

Mike Mahar

Engagement Manager
Berry, Dunn, McNeil & Parker, LLC
mmahar@berrydunn.com

Proposal Submitted On:

February 5, 2025 before 2:00 p.m. CST

Appendix A – Proposal Cover Sheet

Appendix A – Proposal Cover Sheet

Company/Name: Berry, Dunn, McNeil & Parker, LLC

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Charles Leadbetter, Principal
Mailing Address	2211 Congress Street
City, State, Zip	Portland, Maine 04102
Telephone:	(207) 541-2200
E-Mail Address:	cleadbetter@berrydunn.com

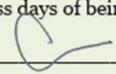
Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	Charles Leadbetter, Principal
Telephone Number	(207) 541-2200
Email Address	cleadbetter@berrydunn.com
Physical Address	2211 Congress Street
City, State, Zip	Portland, Maine 04102
Mailing Address	2211 Congress Street
City, State, Zip	Portland, Maine 04102

- Are you currently registered as a Supplier in MAGIC? YES ___ NO
- If known, what is your supplier number? VND200920001
- Are you currently registered with PayMode? ___ YES NO
- Are you a minority owned company? ___ YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: 2/5/2025

RFP for Strategic Plan & Performance Scorecard

Cover Letter

February 5, 2025

Mississippi Department of Education
Attn: Monique Corley
359 North West Street
Jackson, Mississippi 39201

Dear Monique Corley:

Thank you for the opportunity to submit this proposal in response to the Mississippi (State) Department of Education's (MDE's) request for proposals (RFP) No. 3120003047 for a Strategic Planning Performance Scorecard (Project). We have read MDE's request, and the terms and conditions presented therein. Our proposal is a firm and irrevocable offer, valid for 120 calendar days from the submission date of February 5, 2025.

BerryDunn is a nationally recognized professional services firm with 10 office locations nationwide. For over 50 years, we have built a reputation for excellence by inspiring organizations to transform and innovate while staying true to our core values. Our firm's culture is deeply rooted in understanding our clients' dedication to serving the public, and we approach every project with this commitment in mind. By tailoring our strategies to reflect the unique missions of our clients, we help ensure that our work not only meets their goals but also positively impacts the constituents and communities they serve. We take pride in the meaningful outcomes we help create and the trust we earn through our unwavering dedication to our clients.

Our approach is simple: **consistently provide high-quality services, strive for unparalleled client satisfaction, and deliver both at a reasonable cost.** You can feel confident selecting our firm—we have the expertise, proven approach, and resources to lead the Strategic Planning Performance Scorecard services MDE is requesting. As you evaluate which firm is right for you, please consider the following:



Our Strategic Planning Experience: At BerryDunn, we have a proven track record of partnering with state, local, and governmental agencies—including many in the education sector—and community organizations across the country to address complex challenges.

Our expertise lies in helping clients develop in-depth and actionable strategic plans that align with ambitious timelines and encompass diverse programs and interested parties. We bring extensive experience conducting strategic planning projects of varying scopes and focuses, including state and enterprise-wide strategic plans, department-level business and operational plans, and IT road maps. Recently, we successfully collaborated with the New Hampshire Department of Education's Bureau of Vocational Rehabilitation to deliver a strategic plan tailored to their unique needs, showcasing our ability to navigate complex environments and deliver meaningful outcomes. Our commitment to driving innovation and fostering collaboration helps ensure that every project we undertake provides a clear, actionable path forward.



Our Staffing Expertise: The proposed BerryDunn staff have many years of experience providing strategic planning services for the development of goals and recommendations for the future specific to educational organizations. Within our proposed team:

- **Dori Pratt** has 15 years of experience in higher education, specializing in strategic planning and organizational development across registration, online learning, HR, labor relations, and student services. She has led strategic planning initiatives at the system, campus, and business unit levels, developing and implementing forward-looking strategies that drive institutional success. With expertise in data analysis, key performance indicator (KPI) development, and performance tracking, she ensures plans are both measurable and impactful. Dori also brings over 12 years of experience applying a diversity, equity, and inclusion (DEI) lens to policy and practice. A graduate of a two-year Diversity Leadership Institute Intensive, she is committed to fostering inclusive, results-driven environments that support long-term institutional growth.
- **Megan Clough** has 11 years' experience in higher education, having started in the field of admissions, then shifted to leadership positions in Human Resources and Learning and Organizational Development. With a master's degree in College Student Personnel, she is focused on adult development and creating inclusive and supportive living and learning cultures. Megan's expertise includes strategic planning and transformational change, project and resource management, coaching, organizational assessment, culture creation and communication, and visionary and creative organizational development leadership. She has helped multiple universities and state agencies create their strategic plans, and in her 27-year organizational development career, she has helped to facilitate and create dozens more.

As a principal and leader in BerryDunn's Consulting Services Team, I, Charlie Leadbetter, am legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources. After 51 years of helping clients, we still appreciate every new opportunity and would consider it a privilege to collaborate with the State for the benefit of this Project. Should you have questions, please feel free to contact us. Thank you for your consideration.

Sincerely,



Charles K. Leadbetter
Project Principal
Berry, Dunn, McNeil & Parker, LLC
State Government Practice Group, Principal
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Michael Mahar
Engagement Manager
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Component 1. Plan of Action

Tab 1 - Production/Detailed Service Plan

Executive Summary

BerryDunn is pleased to present a high-level executive summary of our approach in Figure 1 below. Our commitment to guiding organizations through transformative initiatives is underscored by over a decade of experience in strategic planning, extensive engagement specific to educational institutions with diverse populations, a dedication to delivering actionable insights and sustainable outcomes, and guiding mission, vision, and values work.

Figure 1: High-level Executive Summary

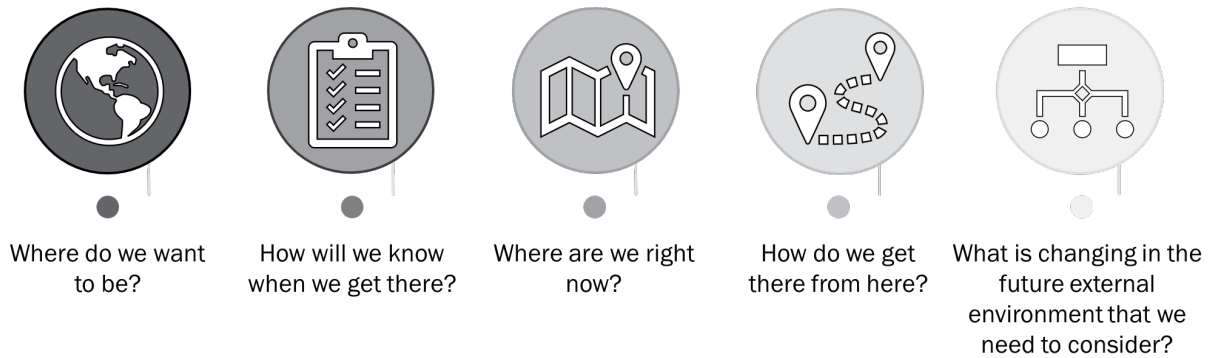


Our project team will engage MDE's selected interested parties in ways that will maximize creativity and innovation and inspire collaboration and consensus for achieving its vision. We will help MDE develop a strategic plan that can reasonably be implemented with support and commitment from its interested parties to meet its vision to "create a dynamic, forward-looking plan that aligns with the organization's mission and addresses current and future educational challenges."

Approach

Strategic planning is a disciplined effort that produces fundamental decisions and actions that shape and guide **what an organization is, who it serves, what it does, and why it does it, with a focus on the future.** A quality strategic plan defines the organization's reason for being, establishes a compelling vision, sets measurable objectives, and—most importantly—lays out the desired impact on and value-add to the community, students, employees, and other interested parties. A strong foundational base for developing a strategy is for organizational leaders to ask reflective questions such as those listed on the next page in Figure 2.

Figure 2: Questions to Ask

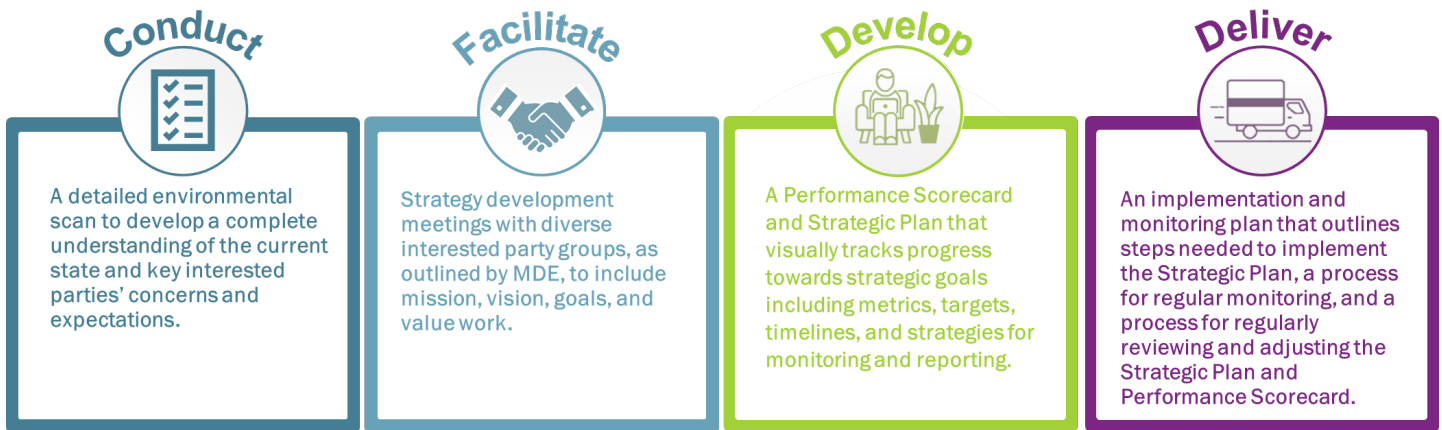


We will help to develop a Strategic Plan that MDE can reasonably implement with support and commitment from its interested parties. We will analyze the external and internal environments, develop a shared vision, formulate and analyze several strategy alternatives, select the optimal strategy, and prepare a Strategic Plan, Performance Scorecard, Implementation Roadmap, and Monitoring Plan.

Methodology

BerryDunn’s methodology emphasizes collaboration, transparency, and measurable outcomes. Figure 3 provides a high-level outline of BerryDunn’s Methodology.

Figure 3: High-Level Outline of BerryDunn’s Methodology



BerryDunn’s proven track record of delivering tailored, actionable solutions sets us apart as a trusted partner in strategic planning. We understand that the success of a strategic plan lies not only in its design but also in its execution. To this end, we focus on building a framework that fosters accountability and continuous improvement while aligning with MDE’s missions. We have carefully reviewed the scope of work outlined in the RFP and have tailored our methodology to address the specific goals, priorities, and requirements of MDE.

Figure 4 on the following page provides an overview of our work plan to effectively and efficiently complete MDE’s strategic planning effort.

Figure 4: Work Plan Overview



On the following pages, we provide detail of our work plan to complete MDE’s desired scope of work.

Phase One

1

Project Initiation and Planning

The first step in any engagement we undertake is a project planning meeting. This helps us understand the scope of the Project and anticipate challenges. Determining whom we need to work with and how we need to work with them is critically important for Project success. For this reason, our methodology includes holding an initial planning meeting immediately after Project start to help ensure we have a clear understanding of the objectives, timelines, and roles involved in the Project. Project planning documents include:

- An interested parties (i.e., stakeholder) list template for MDE to populate identifying the project interested parties we will engage with and what organizations/groups they represent
- A Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis and Environmental Scan Report Deliverable Expectation Document (DED) and Strategic Plan DED to help align expectations regarding deliverable content and format
- A Project Work Plan
- Project kickoff agenda and slides

This task will also include:

- Developing an Interested Party Engagement Plan to detail who needs to be involved in the Project, the Project tasks they should be involved in, and the methods of outreach and information gathering that will engage them.
- Distributing interested parties’ awareness messaging to introduce BerryDunn, explain the purpose and objectives of the Project, and provide information on Project phases and interested parties’ engagement activities.

Throughout the Project, BerryDunn will provide Biweekly Status Reports to MDE to keep them informed of progress.

2

Environmental Scan and Data Collection

In Task 2, BerryDunn will distribute a SWOT Survey and facilitate Environmental Scan focus groups to develop a complete understanding of the current state and key interested parties concerns and expectations. BerryDunn will use feedback from the surveys and focus groups to assess the MDE's internal capabilities and external challenges including trends, regulations and technological advancements within Mississippi's current educational landscape.

During the **SWOT** Survey, we will:

- Identify internal key strategies, skills, structures, systems, resources, and styles that are **strengths** of the MDE.
- Recognize potential internal **weaknesses** of the MDE that need improvement to mitigate risks.
- Explore the MDE's **opportunities** that can be leveraged for growth and success.
- Assess external **threats** to the MDE that could impact funding, performance, or sustainability.

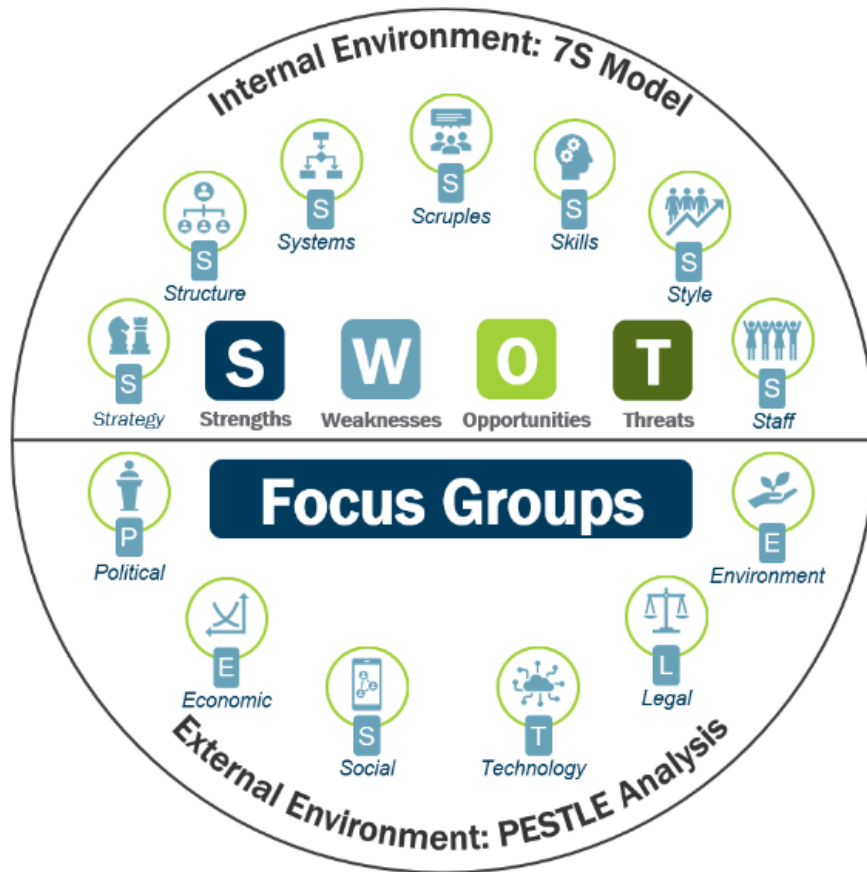
During the Environmental Scan focus groups, we will engage with key members of the MDE's interested parties to assess Mississippi's political, social, economic, technological, legal, and environmental landscape. These interested parties will include selected members of the MDE's:

- State Board
- Leadership
- Educators
- Policy Makers
- Students
- Community leaders and community members
- Staff

We have crafted a unique environmental scan framework synthesized from two International Association for Strategy Professionals (IASP) best practice tools (i.e., the 7S Model and PESTLE Analysis tools, as depicted in Figure 5 on next page), aligned with a SWOT model, to help facilitate participant responses and capture actionable data:

- The 7S Model is a framework used to understand seven internal environmental factors (i.e., strategy, structure, systems, scruples, skills, style, and staff).
- The PESTLE Analysis is a framework used to understand six external environmental factors (i.e., political, economic, social, technological, legal, and environment).

Figure 5: 7S Model and PESTLE Analysis Tools



The resulting data will help ensure we have a complete understanding of customer and other interested parties wants, needs, and expectations. These findings will be discussed with MDE and will help inform the direction of the Strategic Plan. We will finalize the evaluation of the current state and compile the data into a SWOT Analysis and Environmental Scan Report and provide it to the Project team.

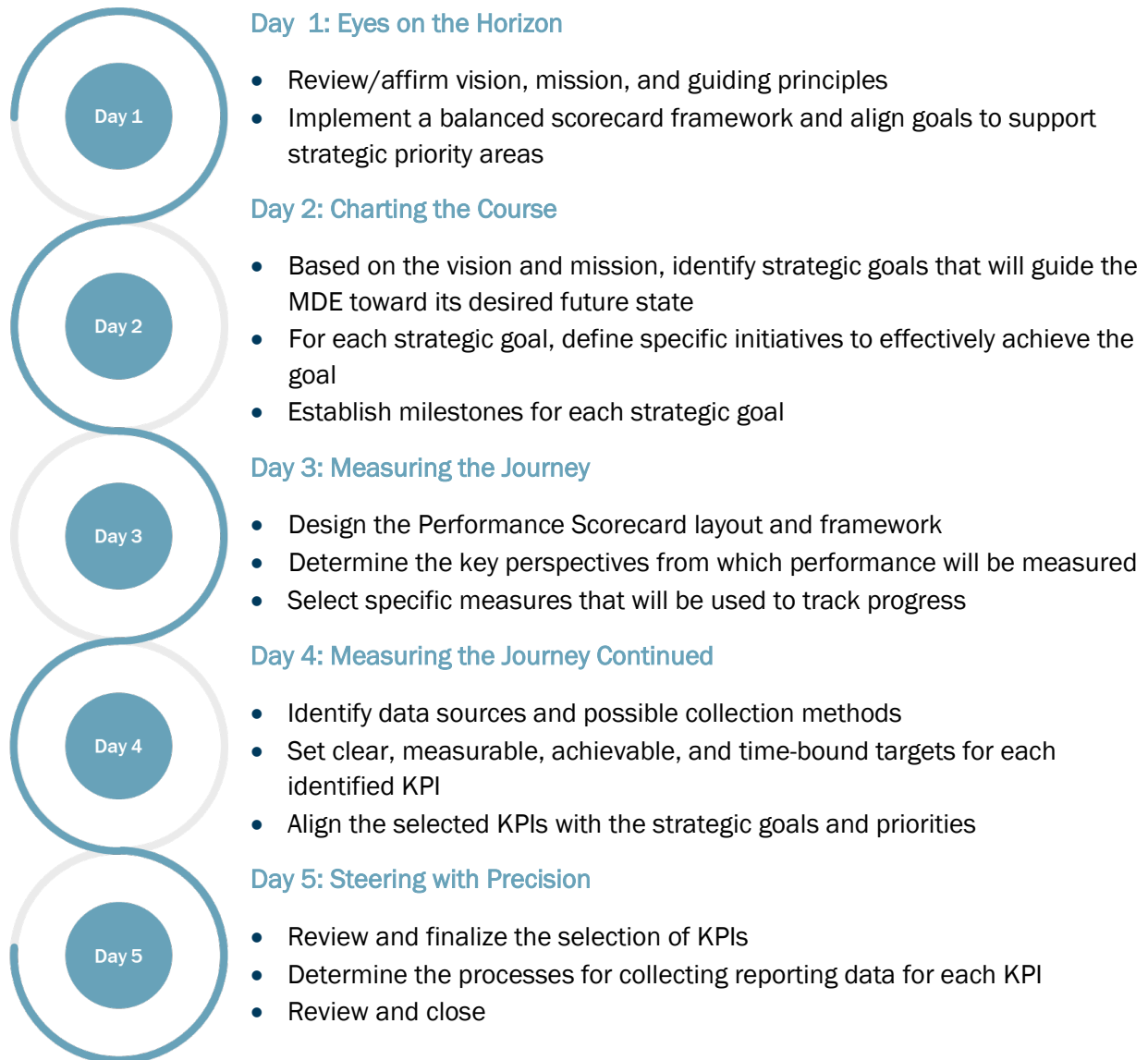
3

Strategy and Performance Scorecard Development

In Task 3, BerryDunn will assist MDE in developing strategic goals, objectives, and initiatives as well as overarching long-term goals. Strategic Planning Sessions will establish the strategic direction—taking into consideration MDE’s renewed/reaffirmed mission, vision, and values. By identifying explicit key drivers of success and strategies for achieving these drivers, we can help MDE to create a dynamic, forward-looking plan that addresses current and future educational challenges. We will later translate the strategy into strategic objectives so we can outline initiatives and build a time-phased plan for their accomplishment.

BerryDunn will develop and distribute handout materials to the session attendees prior to the Five-Day in-person Strategic Planning Sessions as shown in Figure 6 on the following page.

Figure 6: Strategic Planning Topics



4

Drafting and Finalizing the Strategic Plan

In Task 4, BerryDunn will use the information we gathered through the Environmental Scan and SWOT Analysis, in conjunction with the input/feedback gathered in the Five-Day Strategic Planning Sessions, to develop a draft Strategic Plan that will provide MDE with clear objectives and actions designed to help achieve MDE's goals.

We have crafted an approach to strategic planning that is based on best practice organization recommendations (Figure 7). We have synthesized elements of the following best practice organizations and devised a methodology that will help MDE implement standardized best practices tailored to meet its specific requirements.

Figure 7: Best Practice Organizations



In Figure 8, below, we graphically represent the elements of the MDE Strategic Plan and where our approach integrates best practices organization methodologies.

Figure 8: Best Practices Organizations Applied to the MDE Strategic Plan

Mississippi Department of Education	
Section	Best Practice Organization
Section 1 • Introduction	
Section 2 • Vision • Mission • Core Values	 IASP
Section 3 • Current State Analysis • Background and Context • Environmental Scan Result	
Section 4 • Goals • Objectives	 IASP BSI
Section 5 • Strategies • Outcomes • Action Plans • KPIs	 IASP ISSSP TKI
Section 6 • Action Plans	 PMI

BerryDunn will review the draft Strategic Plan with State Board members, educators, community leaders, and the leadership team through in-person workshops. The resulting product will be a final Strategic Plan and Performance Scorecard.



Final Presentation and Handover

In Task 5, BerryDunn will present the final Strategic Plan and Performance Scorecard to the MDE State Board for their approval. Following approval, BerryDunn will conduct a training session for MDE staff on using and monitoring the Performance Scorecard to help ensure proper implementation.

Phase Two



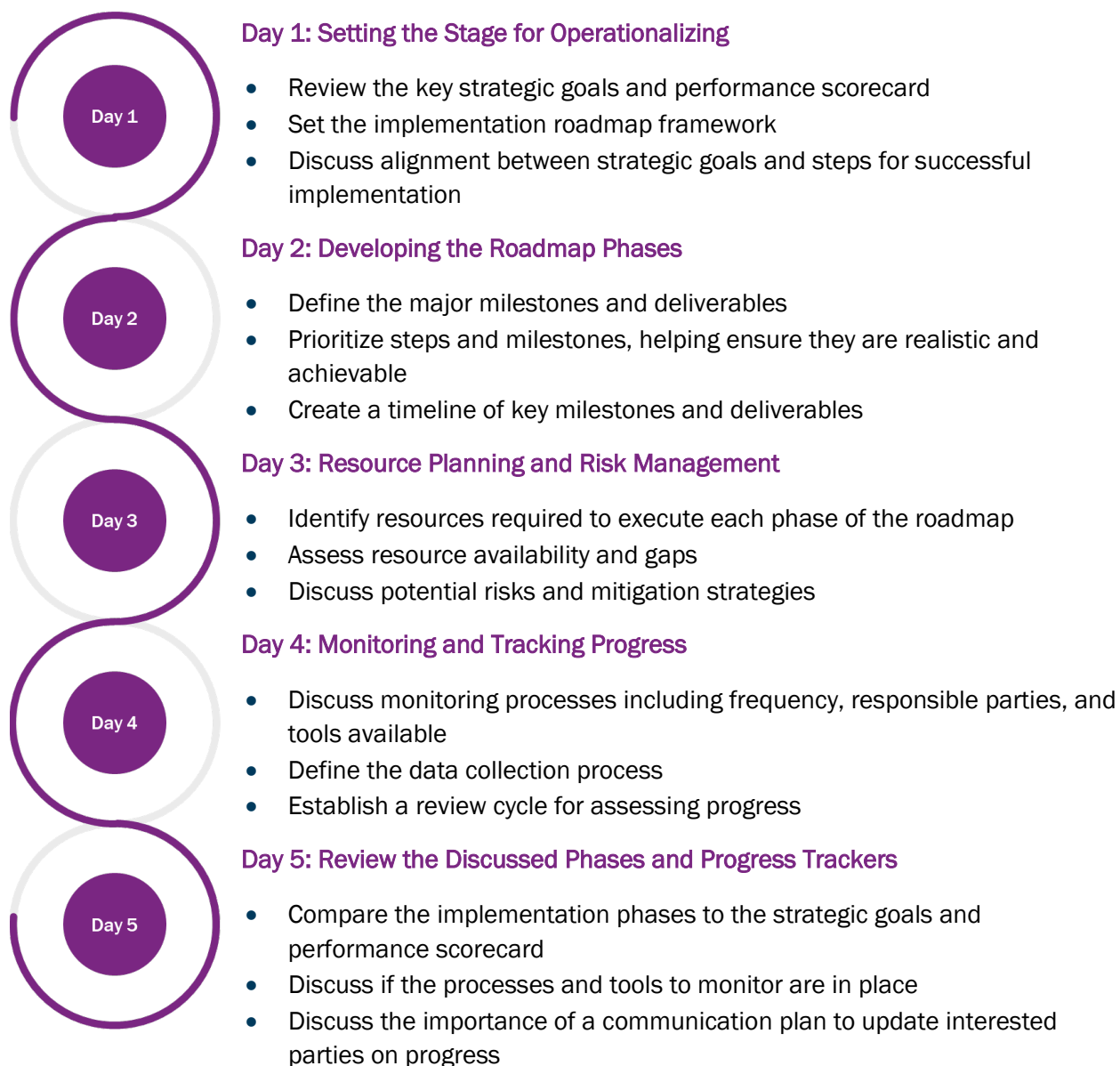
Implementation and Monitoring Plan

In Task 6, BerryDunn will assist MDE in developing an Implementation Roadmap and a Monitoring Plan through an interactive workshop session to translate the MDE's strategic vision into actionable steps and track progress toward success.

Implementation Workshops will establish a clear path for the implementation and monitoring of the Strategic Plan. An effective Implementation and Monitoring Plan helps to optimize resource utilization, facilitate clear collaboration among interested parties, and promotes learning and continuous improvement.

BerryDunn will develop and distribute handout materials to the session attendees prior to the Five-Day in-person Implementation Workshops whose agenda is outlined in Figure 9 on the following page.

Figure 9: Implementation Topics



BerryDunn will draft an Implementation Roadmap and Monitoring Plan based on the discussions in the Implementation Workshop and provide to the MDE for an iterative review to help ensure the Plan and Roadmap are clear and achievable.

In Table 1 on the following pages, we provide a proposed time-bound work plan for MDE's consideration. All tasks highlighted in light green are planned to be conducted on-site, while all other tasks are planned to be conducted remotely.

Table 1: Proposed Work Plan

MS DOE	Duration (in business days)	Start	Finish
	164 days	4/1/2025	11/21/2025
<i>Phase One</i>			
Task 1: Project Initiation and Planning	31 days	4/1/2025	5/14/2025
BerryDunn schedules a one-hour kickoff meeting with the MDE.	1 day	4/1/2025	4/1/2025
BerryDunn develops project planning documents including an interested/involved (i.e., stakeholder) party list, project awareness memo, project kickoff agenda and slides, document/information request, and Project Work Plan and sends them to the MDE for written feedback.	3 days	4/2/2025	4/4/2025
The MDE reviews the project planning documents and provides written feedback to BerryDunn.	3 days	4/7/2025	4/9/2025
BerryDunn finalizes the project planning documents based on the feedback and sends the documents back to the MDE.	1 day	4/10/2025	4/10/2025
BerryDunn facilitates a one-hour kickoff meeting with key State Board of Education (SBE) and Board Designees to clarify objectives, timelines, and roles.	1 day	4/11/2025	4/11/2025
➤ Deliverable 1: Project Work Plan			4/11/2025
The MDE populates the interested/involved/impacted party list template and fulfills the document/information request.	3 days	4/14/2025	4/16/2025
BerryDunn reviews the information document/information request materials (including current strategic plans and performance data) and interested/involved party list the MDE provided.	1 day	4/17/2025	4/17/2025
BerryDunn drafts an Interested Party Engagement Plan and sends it to the MDE for review and written feedback.	5 days	4/18/2025	4/24/2025
The MDE reviews the Plan and provides written feedback to BerryDunn.	1 day	4/25/2025	4/25/2025
BerryDunn facilitates a one-hour meeting with the MDE to review the Plan and discuss the written feedback.	1 day	4/29/2025	4/29/2025
BerryDunn finalizes the Plan and provides it to the MDE.	2 days	4/30/2025	5/1/2025

MS DOE	Duration (in business days)	Start	Finish
		164 days	4/1/2025
➤ <i>Deliverable 2: Interested Party Engagement Plan</i>			<i>5/1/2025</i>
The MDE distributes the interested/involved/impacted party awareness memo.	1 day	5/2/2025	5/2/2025
BerryDunn schedules a one-hour project awareness meeting with interested parties.	1 day	5/5/2025	5/5/2025
BerryDunn develops the meeting agenda and slides and sends them to the MDE for review and written feedback.	2 days	5/6/2025	5/7/2025
The MDE reviews the meeting agenda and slides and provides written feedback to BerryDunn.	3 days	5/8/2025	5/12/2025
BerryDunn finalizes the meeting agenda and slides.	1 day	5/13/2025	5/13/2025
BerryDunn facilitates a one-hour project awareness meeting with all interested/impacted/ involved parties.	1 day	5/14/2025	5/14/2025
Task 2: Environmental Scan and Data Collection	35 days	5/15/2025	7/3/2025
BerryDunn prepares a SWOT Analysis Survey and provides it to the MDE for review and written feedback.	3 days	5/15/2025	5/19/2025
The MDE reviews the Survey and provides written feedback to BerryDunn.	2 days	5/20/2025	5/21/2025
BerryDunn finalizes the Survey.	1 day	5/22/2025	5/22/2025
BerryDunn distributes the Survey to participants as determined by the MDE.	1 day	5/23/2025	5/23/2025
Participants complete the Survey.	4 days	5/27/2025	5/30/2025
BerryDunn reviews, compiles, and analyzes the results from the Survey.	3 days	6/2/2025	6/4/2025
BerryDunn develops interview questions for the Environmental Scan focus groups.	2 days	6/5/2025	6/6/2025
BerryDunn sends the interview questions to the following involved parties and schedules the following on-site environmental scan focus group meetings: <ul style="list-style-type: none"> • One two-hour meeting with all 11 State Board members • One two-hour meeting with all MDE leadership members • One two-hour meeting with up to 15 educators • One two-hour meeting with up to six policy makers 	1 day	6/9/2025	6/9/2025

MS DOE	Duration (in business days)	Start	Finish
	164 days	4/1/2025	11/21/2025
<ul style="list-style-type: none"> • One two-hour meeting with up to 15 students • One two-hour meeting with up to six community leaders and eight community members • One two-hour meeting with up to 15 staff 			
The environmental scan focus group attendees review the interview questions and prepare for the meetings.	5 days	6/10/2025	6/16/2025
BerryDunn facilitates the on-site environmental scan focus group meetings.	3 days	6/17/2025	6/19/2025
BerryDunn develops a SWOT Analysis and Environmental Scan Report and provides to MDE for review and written feedback.	5 days	6/20/2025	6/26/2025
The MDE reviews the Report and provides written feedback to BerryDunn.	3 days	6/27/2025	7/1/2025
BerryDunn facilitates a two-hour meeting with the MDE to review the Report and discuss the written feedback.	1 day	7/2/2025	7/2/2025
BerryDunn finalizes the report and provides it to the MDE.	1 day	7/3/2025	7/3/2025
➤ <i>Deliverable 3: SWOT Analysis and Environmental Scan Report</i>			<i>7/3/2025</i>
Task 3: Strategy and Performance Scorecard Development	25 days	7/7/2025	8/8/2025
BerryDunn develops the strategic planning session material and the pre-work material for strategic planning attendees.	8 days	7/7/2025	7/16/2025
BerryDunn schedules a five-day on-site strategic planning session and provides the pre-work material to the attendees.	1 day	7/17/2025	7/17/2025
Strategic planning session attendees complete the pre-work material and provide to BerryDunn.	3 days	7/18/2025	7/22/2025
BerryDunn reviews the attendee's pre-work material and incorporates it into the strategic planning session material.	2 days	7/23/2025	7/24/2025
BerryDunn prepares for the on-site strategic planning sessions and finalizes the strategic planning session material.	6 days	7/25/2025	8/1/2025

MS DOE	Duration (in business days)	Start	Finish
	164 days	4/1/2025	11/21/2025
BerryDunn facilitates five days of on-site strategic planning sessions.	5 days	8/4/2025	8/8/2025
Task 4: Drafting and Finalizing the Strategic Plan	34 days	8/4/2025	9/19/2025
BerryDunn drafts the Strategic Plan which includes the vision, mission, values, goals, objectives, recommended strategies, goals, and KPIs, as well as recommended staffing and budget strategy options and the Performance Scorecard and provides them to the MDE for review and written feedback.	5 days	8/4/2025	8/8/2025
The MDE reviews the Strategic Plan and Performance Scorecard and sends written feedback to BerryDunn.	3 days	8/11/2025	8/13/2025
BerryDunn facilitates a three-hour meeting with the MDE to review the Strategic Plan and Performance Scorecard and discuss the written feedback.	1 day	8/14/2025	8/14/2025
BerryDunn refines the Strategic Plan and Performance Scorecard.	3 days	8/15/2025	8/19/2025
➤ Deliverable 4: Draft Strategic Plan and Performance Scorecard			8/19/2025
BerryDunn sends the draft Strategic Plan and Performance Scorecard to the following attendees and schedules the following on-site workshops to gather feedback on the Plan and Scorecard: <ul style="list-style-type: none"> • One two-hour workshop with all 11 State Board members • One two-hour meeting with up to 15 educators • One two-hour meeting with up to six community leaders 	1 day	8/20/2025	8/20/2025
The MDE interested parties review the draft Strategic Plan and Performance Scorecard.	3 days	8/21/2025	8/25/2025
BerryDunn prepares for the on-site workshop.	5 days	8/26/2025	9/2/2025
BerryDunn facilitates the on-site workshops with the above MDE interested parties to gather feedback on the draft Strategic Plan and Performance Scorecard.	2 days	9/3/2025	9/4/2025
BerryDunn refines the Strategic Plan and Performance Scorecard based on interested party feedback and sends to the MDE leadership.	3 days	9/5/2025	9/9/2025

MS DOE	Duration (in business days)	Start	Finish
	164 days	4/1/2025	11/21/2025
BerryDunn schedules a two-hour meeting with the MDE leadership team to present the Strategic Plan and Performance Scorecard and provides the Strategic Plan and Performance Scorecard in advance for their awareness.	1 day	9/10/2025	9/10/2025
The MDE leadership team reviews the Strategic Plan and Performance Scorecard.	3 days	9/11/2025	9/15/2025
BerryDunn presents the Strategic Plan and Performance Scorecard to the leadership team for final review.	1 day	9/16/2025	9/16/2025
BerryDunn finalizes the Strategic Plan and Performance Scorecard and sends to the MDE.	3 days	9/17/2025	9/19/2025
➤ Deliverable 5: Final Strategic Plan and Performance Scorecard			9/19/2025
Task 5: Final Presentation and Handover	8 days	9/22/2025	10/1/2025
BerryDunn presents the final Strategic Plan and Performance Scorecard to the MDE State Board.	1 day	9/22/2025	9/22/2025
BerryDunn schedules a two-hour remote training session with the MDE staff on using and monitoring performance of the performance scorecard.	1 day	9/23/2025	9/23/2025
BerryDunn prepares for the training session.	5 days	9/24/2025	9/30/2025
BerryDunn facilitates the training session.	1 day	10/1/2025	10/1/2025
➤ Deliverable 6: Final Presentation and Training			10/1/2025
Phase Two			
Task 6: Implementation and Monitoring Plan	36 days	10/2/2025	11/21/2025
BerryDunn develops the Implementation Roadmap and Monitoring Plan workshop material and the pre-work material for workshop attendees.	5 days	10/2/2025	10/8/2025
BerryDunn schedules a five-day on-site Implementation Roadmap and Monitoring Plan workshop and provides the pre-work material to the attendees.	1 day	10/9/2025	10/9/2025
Workshop attendees complete the pre-work material and provide to BerryDunn.	5 days	10/10/2025	10/16/2025
BerryDunn reviews the attendee's pre-work material and incorporates it into the workshop material.	2 days	10/17/2025	10/20/2025

MS DOE	Duration (in business days)	Start	Finish
	164 days	4/1/2025	11/21/2025
BerryDunn prepares for the on-site workshops and finalizes the workshop material.	4 days	10/21/2025	10/24/2025
BerryDunn facilitates five days of on-site Implementation Roadmap and Monitoring Plan workshops.	5 days	10/27/2025	10/31/2025
BerryDunn drafts the Implementation Roadmap and Monitoring Plan and provides to the MDE for written feedback.	5 days	11/3/2025	11/7/2025
The MDE reviews the Implementation Roadmap and Monitoring Plan and sends written feedback to BerryDunn.	3 days	11/10/2025	11/13/2025
BerryDunn facilitates a three-hour meeting with the MDE to review the Implementation Roadmap and Monitoring Plan and discuss written feedback.	1 day	11/14/2025	11/14/2025
BerryDunn finalizes the Implementation Roadmap and Monitoring Plan and provides them to the MDE.	5 days	11/17/2025	11/21/2025
➤ <i>Deliverable 7: Implementation Roadmap and Monitoring Plan</i>			<i>11/21/2025</i>
Recurring Administrative Activities		4/1/2025	11/21/2025

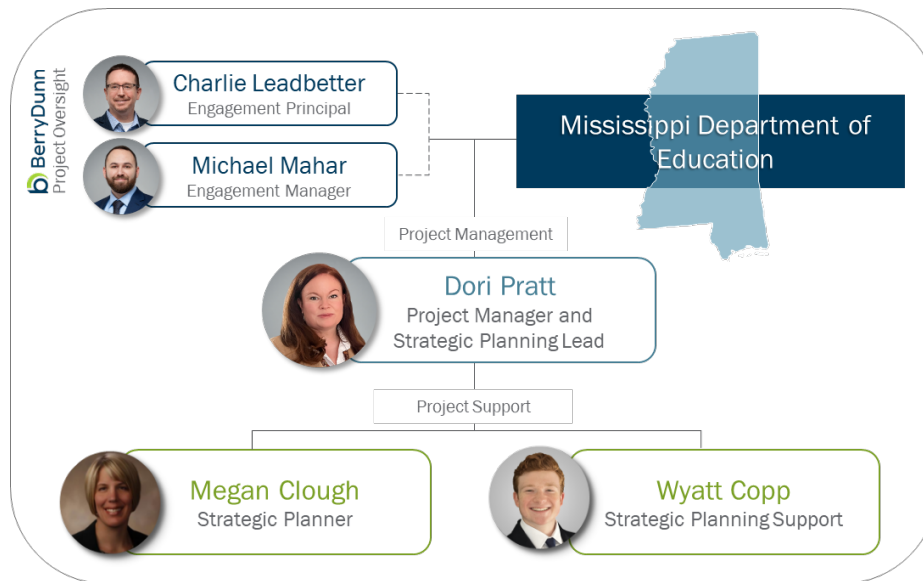
Component 2. Administration

Tab 2 - Resumes

Staffing

We have carefully assembled a project team with unique and specialized qualifications that coincide with the needs and desired outcomes for MDE. Figure 10 describes the organizational structure of our project team, followed by a listing of project staff.

Figure 10: Project Team Organizational Structure



Roles, Responsibilities, and Qualifications

Below and on the following pages, we provide a high-level overview of our project team members' experience, qualifications, and expertise as well as resumes with relevant experience.

PROJECT OVERSIGHT



Charlie Leadbetter | Engagement Principal

PMP®, Prosci® CCP
Berry, Dunn, McNeil & Parker, LLC

Charlie Leadbetter is a principal and leads BerryDunn's State Government Practice Group. He has provided executive leadership for state agencies across the country for over 30 years. He offers best practices in strategic planning, interested party engagement, project management and oversight, and roadmap and strategy development. Charlie serves in an oversight role on various projects and has been a certified Project Management Professional® (PMP®) since 2006, contributing to his ability to effectively drive change for the organizations he serves.

As engagement principal, Charlie will maintain overall responsibility for the quality of our services and deliverables, helping ensure the commitment of our firm and that appropriate resources allocation.



Michael Mahar | Engagement Manager

JD, MBA, LSSGB, Prosci® CCP, COBIT, ITIL
Berry, Dunn, McNeil & Parker, LLC

Michael Mahar is a manager in BerryDunn's State Government Practice Group and leads the Finance and Administration Practice. His experience includes providing strategic planning, project management, and business analysis services to state agencies across the country for over four years. Michael has a Lean Six Sigma Green Belt Certification (LSSGB) and is also currently pursuing a graduate certificate in organizational development. Leveraging the depth of his experience and insights gained through his educational background, Michael brings an expert touch to organizational development initiatives and effectively guides strategic progress for his clients.

As engagement manager, Michael will build and maintain a productive relationship with MDE and BerryDunn's project team members, participate in meetings with project leadership, provide oversight of our team, and review and approve deliverables. He will also engage and support the project team as needed and advise on facilitation strategy and Strategic Plan development.

PROJECT MANAGEMENT



Dori Pratt | Project Manager and Strategic Planning Lead

Lean Facilitator and Trainer, Chain Reaction of Excellence™ implementer, DEIBA certification
Berry, Dunn, McNeil & Parker, LLC

Dori Pratt is a senior consultant in BerryDunn's State Government Practice Group, supporting the Finance and Administration Practice. She is a subject matter expert in organizational development and change management, with extensive experience facilitating strategic planning processes in the education sector at system-wide, campus, and business unit levels. Dori has a proven track record in strategic planning and implementation, having led initiatives at a state university to develop and execute forward-looking, results-driven strategies. With over 15 years in higher education, Dori has expertise in developing KPIs and performance tracking systems for state university systems and campuses. She is highly skilled in data analysis and uses data-driven insights to inform decision-making and measure success. Dori led an underperforming rural college campus through a transformational strategic planning process that led to them becoming a nationally recognized Best College to Work For. Her strong organizational and communication skills enable her to effectively engage diverse groups, ensuring that strategic initiatives are inclusive, actionable, and aligned with institutional goals. Dori's background also includes over a decade as a dorm parent at an independent high school, giving her firsthand insight into the unique challenges facing education, particularly in rural settings. She is a skilled writer and editor, with experience drafting professional documents and strategic reports. Throughout her career, she has prioritized developing policies and practices through a DEI lens. A graduate of a two-year Diversity Leadership Institute Intensive, she is committed to fostering inclusive environments, strengthening group dynamics, and driving meaningful outcomes.

As project manager and strategic planning lead, Dori will serve as the day-to-day contact with MDE, provide project and staff oversight, develop and maintain the project work plan and schedule, lead deliverables development, design and lead the strategic planning process, facilitate engagement

activities and Planning Sessions, develop the final Strategic Plan, support implementation planning efforts, and provide subject matter expertise as needed.

PROJECT SUPPORT



Megan Clough | Strategic Planner

MS, CDTLF, CCF, LSSGB
Berry, Dunn, McNeil & Parker, LLC

Megan Clough is a manager in BerryDunn's State Government Practice Group leading the organizational development practice. Megan has over 27 years of experience designing and implementing creative, effective HR and organizational change management, including strategic plans, communications, organizational development solutions, and operational improvements. With 11 years working in higher education experience and a master's degree in College Student Personnel, she has helped multiple universities create their strategic plans and has helped to facilitate and create dozens more with other nature of organizations. Having been both a consultant in her career and leader within organizations that have taken on large-scale change, Megan's experience is practical, focused on learning and understanding the culture, creating the balance of challenge and support that motivates effective action, and leveraging strengths, access points, and methods that already work within the culture while socializing and initiating practices that will be necessary in the new environment. She is an accomplished relational leader with extensive experience in fostering desired culture and solving key business issues, with a keen ability to provide both global vision and management specifics.

As strategic planner, Megan will provide specialized knowledge and expertise as it relates to strategic planning. She will support the project team as needed to provide highly specialized services and assist with deliverable reviews. Megan will also participate in reviews and research related to strategic planning.



Wyatt Copp | Strategic Planning Support

CAPM®, IIBA®-ECBA™
Berry, Dunn, McNeil & Parker, LLC

Wyatt Copp is a consultant in BerryDunn's State Government Practice Group supporting the Finance and Administration Practice. Wyatt has a strong foundation in performance scorecard best practices. His hands on experience collecting and cleaning data and developing performance metrics and KPIs culminated in the development of a sustainable performance scorecard, as well as a cadence for the routine maintenance and upkeep of the performance scorecard. Wyatt has his Certified Associate in Project Management® (CAPM®) from the Project Management Institute® (PMI®).

Wyatt has experience conducting extensive analysis of internal and external factors impacting an organization. He successfully conducted dozens of on-site and remote workshop sessions with key interested parties to uncover the organization's strengths and weaknesses. Wyatt consistently demonstrates effective communication, writing, and editing skills.

As strategic planning support, Wyatt will document engagement and strategic planning outcomes, help assess the current environment, analyze existing data and documentation, and contribute to deliverable development and facilitation efforts.

Resumes

Beginning on the following page, we include resumes for each of our proposed team members. Their resumes have been tailored to focus on experience relevant to the requested scope of work. Full resumes are available upon request.

Charles K. Leadbetter, PMP®, Prosci® CCP

ENGAGEMENT PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Computer Science
and Economics,
University of Maine

Prosci® Certified Change
Practitioner

Certified Project
Management
Professional® (PMP®)

RELEVANT EXPERIENCE AT BERRYDUNN

31 years

Charlie Leadbetter is a principal and leads BerryDunn's State Government Practice Group. He has provided executive leadership for state agencies across the country for over 30 years. He offers best practices in strategic planning, interested party engagement, project management and oversight, and roadmap and strategy development. Charlie serves in an oversight role on various projects and is a certified Project Management Professional® (PMP®), driving effective change for the organizations he serves.

KEY QUALIFICATIONS

- Leader of State Government Practice Group
- 30+ years of state agency consulting experience
- Strategic planning and business process improvement expert
- Prosci® Certified Change Practitioner (CCP)
- Certified Project Management Professional® since 2006

SELECT PROJECT EXPERIENCE

BerryDunn (1993 To Present)

New Hampshire Department of Education, Bureau of Vocational Rehabilitation (VRNH)

Strategic Planning Services (04/2023 to 02/2024)

Charlie served as project principal for the BerryDunn team performing project initiation and planning, an environmental scan and SWOT analysis, strategic planning sessions, and strategic plan development. BerryDunn provided bi-weekly status reports to VRNH as they led the bureau through a comprehensive strategic planning process. This process defined the bureau's work and enhanced the dual missions of the bureau: assisting individuals with disabilities in obtaining and maintaining competitive, integrated employment and assist business partners with services to meet their workforce needs.

Vermont Agency of Education (AOE)

*Shared School District Data Management System (SSDDMS) Project
Path Forward Facilitation (05/2022 to 11/2022)*

Charlie served as project principal on the BerryDunn team conducting an independent, objective, and multi-faceted assessment of the SSDDMS Project, the implemented PS eFinancePlus (eFP) solution, and Power School in order to help determine if the original and current project path is still viable.

SSDDMS Project (05/2019 to 10/2020)

Charlie served as the project principal for the BerryDunn team providing development and implementation of the latest version of the VT AOE's Accounting Handbook. The Handbook is the single guidance document for all supervisory unions and school districts and was designed to help ensure consistent accounting practices. Furthermore, the VT AOE implemented a school reporting finance and HR system for all supervisory unions and school districts across the state.

Maine Department of Environmental Protection (DEP)

Enterprise Licensing Planning Organizational Change Management (OCM) Services (01/2024 to present)

Charlie serves as the project principal for the BerryDunn team assisting the DEP OCM services as the DEP replaces its Enterprise Licensing System. BerryDunn's initial engagement was to assist in the development of functional and technical requirements, performing research into licensing systems in peer states, and conducting an analysis of the overall cost of acquisition. BerryDunn is now providing OCM services to facilitate and mitigate the necessary disruptions associated with integrating the new ELS with existing processes.

Washington State Liquor and Cannabis Board (WSLCB)

Strategic Portfolio Management Governance Model and Prioritization Process Development (02/2024 to present)

Charlie serves as the project principal for the BerryDunn team assisting the senior leadership of the WSLCB under the Director's Office to develop a strategic portfolio management process that enables an initiative intake process, development of objective assessment criteria, and formalization of a prioritization model that be used as decision-making framework to assess and determine agency priorities and communicate decisions broadly.

Nevada Governor's Finance Office (GFO), Office of Project Management

Project Management Services for Enterprise Resource Planning Implementation (02/2024 to present)

Charlie serves as the project principal on the BerryDunn team performing project management services for Nevada GFO's Core.NV Enterprise Resource Planning (ERP) project. GFO is implementing a CGI Advantage solution for its financial and HR ERP system replacement. BerryDunn is providing project management, vendor and contract management, business process change, communication, and training support to the implementation team.

Washington State Department of Transportation State Ferries (WSF)

OCM Practitioner Services (08/2023 to present)

Charlie serves as project principal on the BerryDunn team providing OCM services to WSF. WSF is currently executing multiple information technology projects and planning for future projects which will result in significant changes to the working environment and daily business processes of the department. BerryDunn is helping ensure department personnel experience these changes as positive while escalating and resolving concerns as WSF transitions from their current state to their future state. These services include business process reviews, policy and procedure reviews, and other OCM-oriented deliverables.

Missouri Office of Administration

Digital Government Transformation (DGT) Program Management Services (02/2023 to present)

Charlie serves as principal on the BerryDunn team performing project management planning, oversight, and related services for the State's DGT initiative. The portfolio includes four project areas consisting of citizen journey mapping, Microsoft 365 implementation, enterprise application infrastructure and citizen portal and data lake development. The DGT portfolio of projects will be implemented for all Executive, Judicial, and Legislative agencies of the State of Missouri.

Minnesota Department of Employment and Economic Development (DEED)

Administration and Financial Services Division (AFS) Mapping Project (02/2023 to 12/2023)

Charlie served as project principal on the BerryDunn team performing an examination of defined division processes and the following production of visual flow diagrams, illustrations, and process maps of the current “as-is” and future “to-be” of the State.

West Virginia Bureau for Public Health (BPH)

Strategic Map Implementation Support and Performance Management/Quality Improvement (PM/QI) Planning (10/2019 to 09/2021)

Charlie served as project principal for the BerryDunn team providing project management and guidance in development of a Performance Management and Quality improvement (PMQI) Plan. BerryDunn provided project oversight services, reporting the project status to the sponsor and project leads monthly, weekly, and as needed. With the development of a PMQI Plan, BerryDunn built capacity to use data to measure performance, solidified a commitment to continuous improvement, and provided guidance to staff on leveraging quality improvement (QI) tools and techniques.

Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (03/2020 to 01/2021)

Charlie served as project principal for the BerryDunn team providing process mapping, requirements gathering, and procedure manual development for the Children and Youth with Special Health Care Needs Program (CYSHCN). BerryDunn worked with the program to refine and finalize the Procedure Manual to align with the eight CYSHCN National Standards. The Program was able to implement streamlined processes and a detailed requirements repository, which allows the Program to finalize a Request for Quotation (RFQ) or Request for Proposal (RFP) to procure a new care coordination and case management solution. Collectively, the business processes and case management system support the Program in improved efficiency and quality of care coordination and integration of information services.

HIV and Hepatitis Workflow/Business Process Analysis and System Configuration (09/2019 to 06/2020)

Charlie served as project principal for the BerryDunn team providing process mapping and a workflow efficiency assessment. BerryDunn redesigned current processes for case management, defined process improvements that aligned with organizational goals, and developed training and implementation support materials.

Oregon Lottery Commission

Enterprise Change Management (01/2020 to 01/2022)

Charlie served as project principal for the BerryDunn team assessing, developing, and implementing strategies that support the OR Lottery Commission in executing its Enterprise Change Management (ECM) effort, involving execution of the Commission’s strategic plan and numerous related projects. This effort includes determining readiness activities and development of change competencies to assist with the creation of an innovative and empowered workplace that strives for the continuous improvement of Lottery employees and services.

Michael Mahar, JD, MBA, LSSGB, Prosci® CCP, COBIT, ITIL

ENGAGEMENT MANAGER

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MBA, University of Southern Maine

Juris Doctor (JD), University of Maine School of Law

BA, Criminology and Political Science, University of Southern Maine

Lean Six Sigma Green Belt (LSSGB) Certification

Prosci® Certified Change Practitioner (CCP)

Control Objective for Information and Related Technologies (COBIT) 2019 Foundation Certification

ITIL 4 Foundation Certification

RELEVANT EXPERIENCE

10 years

Michael is a manager in BerryDunn's State Government Practice Group and leads the Finance and Administration Practice. His experience includes providing strategic planning, project management, and business analysis services to state agencies across the country for over four years.

Michael has a Lean Six Sigma Green Belt Certification (LSSGB) and is also currently pursuing a graduate certificate in organizational development. Leveraging the depth of his experience and insights gained through his educational background, Michael brings an expert touch to organizational development initiatives and effectively guides strategic progress for his clients.

KEY QUALIFICATIONS

- Experienced analyst and project manager, working with large teams and complex groups of interested parties
- Experience providing IV&V and project oversight, health assessment, and audit services
- Direct operations, regulatory, and procurement experience working in and for state government agencies

SELECT PROJECT EXPERIENCE

BerryDunn (02/2019 To Present)

New Hampshire Department of Education, Bureau of Vocational Rehabilitation (VRNH)

Strategic Planning Services (04/2023 to 02/2024)

Michael served as the engagement manager for the BerryDunn team performing project initiation and planning, an environmental scan and SWOT analysis, strategic planning sessions, and strategic plan development. BerryDunn provided bi-weekly status reports to VRNH as they lead the bureau through a comprehensive strategic planning process. This process defined the bureau's work and enhanced the dual missions of the bureau: assisting individuals with disabilities in obtaining and maintaining competitive, integrated employment and assist business partners with services to meet their workforce needs.

Vermont Agency of Education (AOE)

Shared School District Data Management System (SSDDMS) Project Path Forward Facilitation (05/2022 to 11/2022)

AOE started the SSDDMS Engagement to implement an Enterprise Resource Planning (ERP) System for all VT supervisory unions and school districts (SUs/SDs). AOE/ADS made the decision to temporarily halt the project after learning that there were major troubles with the project and solution. AOE and the SUs/SDs have partnered with a BerryDunn team, led by Michael, to assess the SSDDMS Engagement and assist AOE and the SUs/SDs in determining the best option going forward for the SSDDMS Engagement—for presentation to the VT General Assembly.

SSDDMS Project (05/2019 to 10/2020)

Michael assisted the VT AOE by providing development and implementation of the latest version of the VT AOE's Accounting Handbook. The Handbook is the single guidance document for all supervisory unions and school districts and was designed to help ensure consistent accounting practices. Furthermore, the VT AOE implemented a school reporting finance and HR system for all supervisory unions and school districts across the state. Michael worked with the VT AOE's IT lead to help ensure the vendor met the evolving system needs of the state.

Maine Department of Environmental Protection (DEP)

Enterprise Licensing Planning Organizational Change Management (OCM) Services (01/2024 to present)

Michael leads the BerryDunn team assisting the DEP OCM services as the DEP replaces its Enterprise Licensing System. BerryDunn's initial engagement was to assist in the development of functional and technical requirements, performing research into licensing systems in peer states, and conducting an analysis of the overall cost of acquisition. BerryDunn is now providing OCM services to facilitate and mitigate the necessary disruptions associated with integrating the new ELS with existing business processes.

Missouri Office of Administration

Digital Government Transformation (DGT) Program Management Services (02/2023 to present)

Michael leads the BerryDunn team performing project management planning, oversight, and related services for the State of Missouri's DGT initiative. The portfolio includes four project areas consisting of citizen journey mapping, Microsoft 365 implementation, enterprise application infrastructure and citizen portal and data lake development. The DGT portfolio of projects is being implemented for all Executive, Judicial, and Legislative agencies of the State of Missouri.

Washington State Department of Transportation State Ferries (WSF)

OCM Practitioner Services (08/2023 to present)

Michael leads the BerryDunn team providing OCM services to WSF. WSF is executing multiple information technology projects and planning for future projects resulting in significant changes to the department's working environment and daily business processes. BerryDunn is helping ensure department personnel experience these changes as positive while escalating and resolving concerns as WSF transitions from their current state to their future state. These services include business process reviews, policy and procedure reviews, and other OCM-oriented deliverables.

Minnesota Department of Employment and Economic Development (DEED)

Administration and Financial Services Division (AFS) Mapping Project (02/2023 to 12/2023)

Michael led the BerryDunn team analyzing AFS' financial functional process areas, resulting in the creation of current "as-is" and future "to-be" visual flow diagrams, as well as supporting training documentation and a report on recommended modifications to business processes and technologies.

Oregon Lottery Commission

Enterprise Change Management (01/2020 to 01/2022)

Michael served as change agent on a BerryDunn team assessing, developing, and implementing strategies that support the OR Lottery Commission in executing its Enterprise Change Management (ECM) effort, involving execution of the Commission's strategic plan and numerous related projects. This effort includes determining readiness activities and development of change competencies to assist with the creation of an innovative and empowered workplace that strives for the continuous improvement of Lottery employees and services.

Georgia Department of Administrative Services

Comprehensive Business Process Review and Redesign Project (08/2019 to 10/2019)

Michael led an end-to-end business process review of the GA DOAS' collection and receipt of procurement-related administrative fees from master contract vendors. The review involved as-is and to-be business process mapping, identifying major pain points in the current process, providing recommendations to alleviate those pain points, and avoiding current errors through a proposed to-be business process. BerryDunn's team used business process improvement methodologies and conducted research on successful practices, as well as related systems used by other states.

Maine Department of Health and Human Services (01/2015 to 01/2019)

Deputy Commissioner of Program Policy and Operations (08/2017 to 01/2019)

Michael managed and oversaw thousands of employees across five different business sectors including child and family services, aging and disability services, facility operations, constituent services, and project management. He provided oversight of social service and public benefit programs, including MaineCare and Medicaid waiver services. He engaged staff at all levels through job shadowing and holding division and topic immersion sessions. He exercised sound stewardship of taxpayer funds through rightsizing of lapsing budget allocations. He submitted testimony to the legislature and conducted speaking engagements to promote agency goals. He responded to state/federal audits and tightened related standard operation procedures. He ensured state and federal regulatory compliance with various programs and services. He developed strategic plans to align operations in furtherance of the vision of the administration.

Senior Legal and Policy Advisory (08/2016 to 01/2019)

Michael provided strategic advice to executive staff on healthcare and welfare policy reforms. He provided legal advice to executive staff on regulations and the legislative process. He conducted complex legal research and drafted memoranda for executive staff in areas such as the following: HIPAA, confidentiality, and privacy issues; Medicaid; spending authority; employment law; state psychiatric patient issues; debt-collection; contractual issues; payment and performance bonds.

Counsel and Proposal Manager for the Division of Contract Management (01/2015 to 07/2016)

Michael drafted long-term and temporary clinical staffing contracts, and staff recruitment contracts. He prepared contracts for direct client services (health, safety, and welfare) and IT consulting services. He wrote all contract deliverables and service level agreement aspects for both fixed price and time and material technology contracts. He drafted requests for Information and requests for proposal. He also managed the procurement process for all agency contracts.

Susan J. Szwed, PA (Portland, ME) (10/2011 to 12/2014)

Michael represented clients in post-judgment collection litigation matters for credit card debt, consumer/commercial lines of credit, subrogation debt, mortgage deficiency, auto loan deficiency, and hospital debt.

Dori Pratt

PROJECT MANAGER AND STRATEGIC PLANNING LEAD

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

Business classes with a Human Resources focus, University of Maine

Civil Rights Investigator Training, Oct 2019

AWARDS

2020 Best Colleges to Work For – first UMS school to win this designation with highest honors, top 10 schools in the nation that year.

Dori Pratt is a senior consultant in BerryDunn’s State Government Practice Group, supporting the Finance and Administration Practice. She is a subject matter expert in organizational development and change management, with extensive experience facilitating strategic planning processes in the education sector at system-wide, campus, and business unit levels. Dori has a proven track record in strategic planning and implementation, having led initiatives at a state university to develop and execute forward-looking, results-driven strategies.

With over 15 years in higher education, Dori has expertise in developing key performance indicators (KPIs) and performance tracking systems for state university systems and campuses. She is highly skilled in data analysis and uses data-driven insights to inform decision-making and measure success. Dori led an underperforming rural college campus through a transformational strategic planning process that led to them becoming a nationally recognized Best College to Work For.

Her strong organizational and communication skills enable her to effectively engage diverse groups, ensuring that strategic initiatives are inclusive, actionable, and aligned with institutional goals. Dori’s background also includes over a decade as a dorm parent at an independent high school, giving her firsthand insight into the unique challenges facing education, particularly in rural settings. She is a skilled writer and editor, with experience drafting professional documents and strategic reports. Throughout her career, she has prioritized developing policies and practices through a diversity, equity, and inclusion (DEI) lens.

SELECT PROJECT EXPERIENCE

BerryDunn (12/2024 To Present)

Dori is a senior consultant in BerryDunn’s State Government Practice Group with a focus on Change Management, Organizational Development, DEI, and various Human Resources related subject matter.

WildernessFusion (2021 to 2023)

As a registrar, Dori coordinated online educational materials, recruited new students, assisted in building a new website, and helped support the school's mission.

University of Maine System (2008 to 12/2020)

Dori served in several rolls during her time with UMaine, including as an HR leader for several campuses, a labor relations manager, a senior HR business partner, and an administration associate.

In these roles, she provided a variety of services, including serving as a primary consultant to leaders in maximizing results by advising the use of sound Human Resource practices, a people-oriented approach, and efficiencies regarding employee development, issue spotting, data analytics, equal opportunity, effective performance management strategies, recruitment, retention, succession planning, compensation, organizational development and learning, policies, and procedures.

She managed all in person supervisor training for the University, including content development, teaching and coaching, and learning material development. Dori also helped lead strategic HR transformation from campus facing HR employees to strategic consultant model where various campuses and departments were served as clients. Other accomplishments include contributing to multiple large-scale HR transformation initiatives and change management projects aimed to enhance organizational effectiveness, streamline HR processes and drive cultural change by leading project teams and ensuring alignment with project objectives and timelines.

Dori also served as a member of the UMS Human Resources Leadership Team, sat on two President's cabinets partnering closely with finance on every initiative, and supervised teams.

PUBLICATIONS AND PRESENTATIONS

Generations in the WorkForce – Maine HR Conference 2019

Generations in the WorkForce – Northern Maine HR Conference 2019

Megan Clough, MS, CDTLF, CCF, LSSGB

STRATEGIC PLANNER

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MS, College Student Personnel, Culture Creation and Adult Learning, Miami University of Ohio

BA, Cultural Anthropology and Japanese, Bates College

Lean Six Sigma Green Belt

Dare to Lead™ Certified Facilitator (CDTLF), Brené Brown Education & Research Group, 2019

Crucial Conversations® Certified Facilitator, (CCF) VitalSmarts (now Crucial Learning), 2017

Customer Experience Excellence® Certified Facilitator, Worldclass Benchmarking, 2015

Predictive Index Career Coaching Professional. The Cornerstone Group, 2012

Senior Professional in Human Resources (SPHR), Society for Human Resources

Megan Clough is an organizational development manager for the BerryDunn State Government Practice Group. Megan is an accomplished relational leader with extensive experience in fostering desired culture and solving key business issues. She has a keen ability to provide both global vision and management specifics. She has experience designing and implementing creative, effective organizational development (OD) and organizational change management (OCM) solutions and programs at all levels. Megan is a high integrity project leader with strong organization, communication, partnership, and influence skills. She is a compassionate and trusted advisor who helps adult learners expand their choices, skills, and confidence to take decisive action toward achieving goals.

KEY QUALIFICATIONS

- 27 years of organizational development solution experience, including developing and delivering solutions to maximize employee experience and transform cultures
- Areas of expertise include strategic planning, coaching, organizational assessment, culture creation and communication, transformational change, project and resource management, and visionary and creative organizational development leadership

SELECT PROJECT EXPERIENCE

BerryDunn (12/2022 to Present)

New Hampshire Department of Education, Bureau of Vocational Rehabilitation (VRNH)

Strategic Planning Services (04/2023 to 02/2024)

Megan served as a subject matter expert for the BerryDunn team performing project initiation and planning, an environmental scan and SWOT analysis, strategic planning sessions, and strategic plan development. BerryDunn provided bi-weekly status reports to VRNH as they led the bureau through a comprehensive strategic planning process. This process defined the bureau's work and enhanced the dual missions of the bureau: assisting individuals with disabilities in obtaining and maintaining competitive, integrated employment and assist business partners with services to meet their workforce needs.

Management, 2007

Advanced Facilitation,
Project Management for
Trainers, Instructional
Design. Langevin
Learning Services, 2000

Certified Measure of
Epistemological
Reasoning (MER) Analyst,
A Tool measuring Adult
Learning (Baxter-
Magolda), 1996

BERRYDUNN TENURE

2 years

North Dakota Department of Human Services

North Dakota Immunization Strategic Plan (04/2024 to present)

Megan is serving as the Strategic Planning SME to develop a five-year strategic plan for the North Dakota Immunization Unit. This includes reviewing current data trends; compiling standards and best practices; conducting surveys and listening sessions; and collecting, assessing, and identifying community needs.

Oklahoma Department of Human Services

Digital Transformation Office (DTO) Organizational Change and OD Services (03/2024 to present)

Megan is providing change management leadership support and OD services to help support the State's decision to create a DTO to support enterprise-wide technology capabilities assessment and selection for DHS programs. The engagement has involved the creation of the DTO's first strategic plan including associated progress tracking tools and internal- and public-facing versions. The overall effort involves notable change management work in conjunction with OD to accelerate the creation and efficacy of a key function.

North Dakota Department of Health and Human Services (DHHS) Developmental Disabilities Services

Consulting Services for a Workforce Development Needs Assessment (08/2023 to 02/2024)

Megan served as a subject matter expert on this project to assess the training needs of the workforce for the Developmental Disabilities Section through facilitating discovery sessions with interested parties, performing research, and developing needs assessment findings and recommendations for DHHS to improve workforce development strategies across the state.

Washington Department of Social and Health Services (DSHS)

Organizational Development Project (12/2022 to 11/2023)

Megan provided change management support within a project scope supporting the Technology Innovation Administration's (TIA's) systematic exploration and selection of an IT Governance and Management approach and decision-making related to TIA's organizational structure to best support the departments' business needs. Megan provided a comprehensive communication plan and monthly and as-needed coaching, training, and management advising support to help facilitate successful change. Megan facilitated development of an organizational change management (OCM) roadmap as TIA finalized governance/structure decisions.

Missouri Office of Administration

Digital Government Transformation (DGT) Program Management Services (12/2022 to present)

Megan is providing change management support as the State embarks on multiple technical implementations that will collectively enhance the State of Missouri web-based portal engagement experience for citizens and businesses who interact with the state. The DGT Initiative also includes a significant upgrade to a cloud-based collaboration suite for enhanced productivity that will impact all state of Missouri staff.

University of Maine System (2014 to 12/2022)

While at the University of Maine System, Megan served as the associate director of human resources (HR) and director of equity and diversity (2014 to 2015) and director of learning and organizational development (2015 to 2022). She also served as co-chair of the UMS diversity, equity, and inclusion committee (2021-2022). Megan was hired to facilitate UMS' transition to a strategic HR approach and to support the System's transition to a matrix organizational structure. She focused on developing, delivering, and scaling aligned OD, OCM, and HR solutions that maximize employee experience and the results they deliver for students, communities, and industry. This work included partnering with two of the system universities to build their strategic plans and helping the overall system orient to practices that build worldclass organizations.

Megan designed and led strategies to assess, set goals, and build readiness, then created and implemented learning, projects, technology integrations, and other OD solutions to achieve results. She demonstrated inclusion as the foundation of differentiated, highest-achieving organizations that additionally align employee and client experience, transparent communication, continuous improvement, and accountable performance. She addressed survey-revealed student and employee experience deficits by influencing leadership to action. Megan taught University presidents and cabinets the chain reaction of excellence for organizational strength and partnered with them to integrate relevant organizational design and change management practices.

Megan normalized behavioral respect, care, and courage leadership practices by persuading Universities to create and accountably live by an inclusive service promise and operational values set reflecting their unique character. She engaged UMS employees to envision and help create an internal workforce skills development entity branded as UMS Academy, which operates in complement to specific faculty education, to professionally develop employees. Megan leveraged vendor partners, internal subject matter experts, and specialty cohorts to provide meaningful digital, hybrid, and in-person learning. She addressed poor ratings about new hire orientation after the matrix transition dismantled the prior approach. She led a 26-person multi-functional team to conduct focus groups and identify desired outcomes, fixed notable process and technology issues, and used learning and networking to create a peak new hire orientation experience that accelerated employees' success. She addressed safety and legal compliance business targets by using data to motivate action. In the absence of any formal authority role, Megan created, led, and aligned a 25-person compliance education committee to co-create governance and design, plus deliver and manage, a digital annual required compliance training series for all university students and non-student employees. She tuned to the broader workforce ecosystem and UMS' while operating with limited resources. She intentionally created, curated, prioritized, and interleaved digital and other core learning content focused on leadership, change, communication, courage, innovation, customer experience, coaching routine, inclusion, emotional health, focus and resilience.

Bangor Savings Bank (BSB) (2002 to 2014)

During her time at Bangor Savings Bank, Megan assumed multiple roles, including employee development director, and learning center coordinator (2002 to 2004), vice president of employee development/human resources assistant director (2004 to 2008), senior vice president/human

resources director (2008 to 2010), and senior vice president/employee development manager (2010 to 2014). In follow-up to BSB's transition from a pure savings bank to a full-service financial institution including financial advising, Megan's primary responsibilities included providing strategic guidance to bank leadership to unite the entire bank and clients around the brand 'You Matter More.' She transitioned HR to a strategic model and systematically assessed, adjusted, and enhanced workforce learning, skills, and practices to optimize integrity to the 'You Matter More' promise. She created a customer experience culture recognized by J.D. Power and Associates by assessing the Bank's client experience approach and components, setting standards of excellence, and calibrating practices to those standards. She designed and delivered key learning experiences as part of the strategy. She aligned employees to priorities by designing and automating a comprehensive talent and performance management approach tied to the strategic goal process, management routine, incentive structure, and 'You Matter More' promise. She supported an engaging annual sales rally that enabled salesforce and client recognition. She improved employee confidence and skill by providing job-relevant learning and development opportunities across 15+ financial industry specialties by creating a Corporate University with over 1,500 offerings. She developed subject matter experts to maximize scale and scope. Megan initiated curriculum development and personal coaching to advance knowledge and skill progression. She focused on business development, lending, wealth management, client experience, and career planning. She enhanced trust and workforce results by devising and implementing a creative Bank-wide internal communication plan that featured fun, informative interaction with the executive team.

Global Lead Management Consulting (1998 to 2002)

As project manager, consultant, and trainer, Megan consulted to support Fortune 100/500 companies committed to making Diversity, Equity, and Inclusion (DEI) core to their culture. She guided strategic planning and connection-focused organizational development accelerators to renovate cultures authentically and sustainably. She enhanced clients' product designs and launches by providing custom learning experiences focused on inclusion, specific cross-cultural commonalities and differences, and highlighting the measurable impact of intentional client experience practices. She conducted qualitative and quantitative culture audits to assess baseline diversity and inclusion practices. Megan developed and implemented solutions in partnership with company leadership and teams focused on employee care, marketing, sales, and client experience. She regularly taught and facilitated sessions on the topic of diversity. Megan created experiential simulations and other learning resources to accelerate awareness and skills.

Wyatt Copp, CAPM[®], IIBA[®]-ECBA[™]

STRATEGIC PLANNING SUPPORT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Business Administration, University of Massachusetts Lowell

Certified Associate in Project Management[®] (CAPM[®])

Certified International Institute of Business Analysis[®] (IIBA[®]), Entry Certificate in Business Analysis (ECBA[™])

Wyatt Copp is a consultant in BerryDunn's State Government Practice Group supporting the Finance and Administration Practice. Wyatt has a strong foundation in performance scorecard best practices. His hands-on experience collecting and cleaning data and developing performance metrics and KPIs culminated in the development of a sustainable performance scorecard, as well as a cadence for the routine maintenance and upkeep of the performance scorecard. Wyatt has his Certified Associate in Project Management[®] (CAPM[®]) from the Project Management Institute[®] (PMI[®]).

KEY QUALIFICATIONS

- Experienced in conducting environmental scans.
- Demonstrates effective communication, writing, and editing skills.
- Project Management Institute[®] Certified Associate in Project Management[®] and Entry Certificate in Business Analysis[®] certified from the International Institute of Business Analysis[®]

SELECT PROJECT EXPERIENCE

BerryDunn (06/2024 To Present)

Wyatt recently joined BerryDunn's State Government Practice Group as a consultant after completing his BerryDunn internship program.

– Vermont Agency of Digital Services (ADS)

Independent Reviews (07/2024 to present)

Wyatt has been a business analyst for multiple independent reviews of large IT-related initiatives for numerous Vermont agencies. These reviews, required under State statute by the Office of the CIO, involve interviewing with key interested parties involved on the upcoming project, conducting financial analyses and market research, evaluating the draft vendor contracts and implementation plans, assessing the planned technical and project management approach and related activities, and identifying risks and related remediation efforts.

– Commonwealth of Kentucky Integrated Tax System (ITS)

Independent Verification and Validation (IV&V) Services (11/2024 to present)

Wyatt's responsibilities include the following: reviewing performance metrics to allow tracking project completion against milestones set by

the Commonwealth; reviewing, assessing, and providing recommendations for all Commonwealth and ITS vendor scheduled deliverables; reviewing and making recommendations on the management of the project (both Commonwealth and vendor); providing risk and issue management recommendations; reviewing, assessing, and providing recommendations regarding training and organizational change management; verifying that the acceptance criteria for each phase is defined, reviewed, and approved prior to user acceptance test(s) and that the test(s) results are documented; certifying the system is ready for user acceptance testing; and verifying a Change Management Plan is created and followed.

– **Arizona Health Care Cost Containment System (AHCCCS)**

IT Governance, Risk and Compliance Implementation (06/2024 to present)

Wyatt served as an intern and now serves as a business analyst on the BerryDunn team providing implementation of the IT governance and risk management roadmap recently developed by BerryDunn for AHCCCS's IT Governance, Risk, and Compliance (GRC) team. BerryDunn collaborates with the GRC team in collecting data, information mapping, and implementing the IT governance and risk management roadmap to the desired maturity levels within the COBIT 2019 framework while satisfying ITIL aspects throughout.

– **Finance and Administration Practice Group Intern (06/2024 to 08/2024)**

Wyatt served as an intern for BerryDunn's Finance and Administration Practice where he supported consultants and performed key research activities that advanced the Practice's strategic initiatives and business plans. During his internship, Wyatt learned about the firm's emphasis on delivering quality to the customer and gained experience in assuring consistent quality of deliverables. He also assisted with scheduling meetings, deliverables development, note taking, client research, and knowledge sharing activities for BerryDunn's most valuable clients.

University of Massachusetts Lowell (09/2021 to 05/2024)

Wyatt served as the intramural referee supervisor for intramural competition and participants ensuring competition followed all safety guidelines. Wyatt developed staff from entry level officials to supervisors through encouragement, constructive feedback, and mentorship. He was also recognized for by the Intramurals Department at UMass Lowell with a nomination to the National Student employee of the Year for the 2022 – 2023 school year.

Amazon.com (06/2023 to 08/2023)

Wyatt served as an area manager intern for Amazon.com where he quickly and successfully built trust with mentors, colleagues, and subordinate team members. Wyatt's significant contributions included assembling a cross-functional team and directing the installment of two problem solving solutions to improve efficiency and network compliance. Wyatt also implemented solutions with immediate and long-term impact using data to identify opportunities and reducing package defect Key Performance Indicators (KPIs).

Methods Machine Tools, Inc. (06/2022 to 12/2022)

As a data analytics and project management co-op, Wyatt successfully helped the department achieve ISO certification by leading multiple continuous improvement projects. In doing so he achieved thorough understanding of the responsibilities of a data analyst by managing data for the company as part of his day-to-day responsibilities. He developed a streamlined process for data management using the ServiceNow ITBM software for project managers and created a dashboard that visualized the department's KPIs and targets by leveraging PowerBI software and achieved a reduction in nonconforming data.

Tab 3 - References

Below, we provide three requested references for projects of similar size and scope.

Reference #1:



Company: New Hampshire Department of Education, Bureau of Vocational Rehabilitation

Project Dates: 04/2023 to 03/2024

Contact: Ella McAllister

Title: Administrator, Policy and Training

Address: 21 South Fruit Street, Suite 20 Concord, NH 03301

Telephone: 603.271.3803

Email: ella.k.mcallister@doe.nh.gov

BerryDunn led the bureau through a detailed strategic planning process to:

- Define the future of the bureau's work and enhance the dual missions of the bureau
- Align the format and content of the bureau's strategic plan to the Combined Workforce Innovation and Opportunity Act (WIOA) State Plan
- Assist individuals with disabilities in obtaining and maintaining competitive, integrated employment and assisting business partners with services to meet their workforce needs

BerryDunn performed an environmental scan using an online SWOT survey and follow-up interviews to:

- Identify historical and current trends
- Classify SWOT
- Help inform overarching objectives
- Support the Combined WIOA State Plan

BerryDunn facilitated an on-site three-day strategic planning retreat with key staff, core partners, and business representatives to:

- Review/affirm vision, mission, and guiding principles
- Identify goals and objectives
- Align strategies, action plans, and key performance indicators (KPIs)

BerryDunn continued virtual and in-person working groups with key staff to finalize the strategic plan and:

- Identify resources needed to complete action steps

- Create a four-year time map
- Develop an internal- and external-facing version of the strategic plan

Reference #2:



Company: Oklahoma Human Services
 – Digital Transformation Office
Project Dates: 02/2024 to 12/2025
Contact: Brendan Hope
Title: Chief Digital Officer (CDO)
Address: Oklahoma Human Services
 2400 N Lincoln Boulevard
 Oklahoma City, OK 73105
Telephone: 405.388.7934
Email: brendan.hope@okdhs.org

Oklahoma Human Services decided to stand up a new division—the Digital Transformation Office (DTO)—to support technology selection, data governance, and security for the agency. The decision derived from a contracted assessment BerryDunn conducted of the agency’s current state and recommendations.

BerryDunn was then hired under a separate contract to provide organizational change management (OCM) services to support DTO’s organizational development (i.e., DTO Optimization Project). Oklahoma Human Services quickly expanded BerryDunn’s contract to serve as the project manager and provide organizational development services including strategic planning.

The DTO’s eight-person leadership team was new, two members had served as director level in their career, and none had ever been involved in developing a strategic plan. BerryDunn recommended and confirmed an intentional approach to concurrently strengthen the leadership team and develop a strategic plan. The CDO wanted to help ensure the leadership team strengthened the way they operate, learned how to develop a strategic plan, and co-created the DTO’s first strategic plan.

BerryDunn:

- Facilitated a leadership team retreat focused on understanding the DTO’s matrixed organizational structure, discussing how to leverage each other’s strengths¹, and exploring the differentiated role of director.
- Conducted an on-site, one-day strategic planning session with the leadership team and core partners (e.g., Chief Technology Officer, Project Management team members) introducing the strategic plan components and their purposes, the Balanced Scorecard™ approach, goal setting and measurement best practices, and co-creation principles/practices.

¹ Identified using The Gallup Foundation’s CliftonStrengths® assessment.

- Leveraged the current state assessment and recommendations, change readiness assessment results, and listening session insights as an informal SWOT analysis.
- Facilitated a second on-site, one-day strategic planning session and follow-up virtual sessions with the leadership team and core partners (e.g., Chief Technology Officer and team members) to:
 - Review and affirm the DTO mission and vision and develop the DTO service promise and operational values
 - Identify Initiatives, Focus Areas, Strategic Objectives, Action Steps, and Supporting Tasks
- Facilitated the leadership team through the process of developing associated measures using the objectives and key results (OKRs) methodology.
- Created an associated OKRs tracking document to support regularly scheduled progress checks, measurement tracking, reporting, and accountability.
- Drafted the strategic plan including collecting leadership quotes, creating explanatory models/figures, drafting the approach sections, transferring and aligning co-created goal planning elements (e.g., initiatives, focus areas, strategic objectives, action items, supporting tasks, and key results), refining language, and managing graphic design.
- Developed internal- and external-facing versions of the strategic plan, including using specialized graphic design for the external-facing version which included content at the Initiatives and Strategic Objectives level only.
- Recommended and facilitated an OCM strategy for communicating the draft to all DTO staff for review and feedback.

The CDO and his leaders have developed an excellent collaborative working approach, describe being appreciative of the strategic planning process, and are proud of the strategic plan they have created. Based on their high level of satisfaction with the DTO strategic plan, Oklahoma Human Services has asked BerryDunn to help create its IT strategic plan.

Reference #3:



Company: West Virginia Department of Health and Human Resources, Bureau for Public Health, Office of Epidemiology and Prevention Services

Project Dates: 12/2021 to 12/2022

Contact: Suzanne Wilson, MPH

Title: Director, Division of STD, HIV, Hepatitis, and Tuberculosis

Address: West Virginia Bureau for Public Health

350 Capitol Street, Room 125
Charleston, WV 25301

Telephone: 304.558.3669

Email: suzanne.m.wilson@wv.gov

In 2022, the West Virginia Bureau for Public Health (BPH) needed to fulfill a federal mandate to develop a five-year HIV and Hepatitis C (HCV) strategic plan aimed at preventing new cases and addressing the burden of infection. BPH responded to HIV outbreaks over the previous two years and had limited agency capacity to develop a plan that would meet all programmatic and legislative requirements associated with federal funding from the Centers for Disease Control and Prevention (CDC) and the Health Resources and Services Administration (HRSA).

BerryDunn was hired to provide technical assistance and administrative support for the 12-month strategic planning process.

The existing staff did not have experience with strategic planning methodologies and lacked the knowledge and skills needed for the extensive level of partner

engagement required by the federal mandate. BerryDunn recommended an approach to build BPH capacity while developing the strategic plan. BerryDunn:

- Provided project management services and expertise on best practices and federal requirements.
- Worked with BPH leadership to set a project governance structure that met federal requirements and the state's needs, drafting a project charter that outlined the rules, procedures, roles, and responsibilities and established a steering committee, four subcommittees, and a people with lived experience (PWLE) advisory group.
- Drafted shared language standards with guiding principles to use in the planning process.
- Developed a partner engagement plan and tracked engagement levels for the 214 partners throughout the planning process.
- Identified key contextual factors examined by other states and factors relevant to West Virginia.
- Designed and facilitated a mixed methods assessment process that:
 - Identified primary and secondary data sources, compiled data, and developed an epidemiological profile.
 - Conducted mind mapping sessions with BPH staff and partners to identify needs, gaps, barriers, strengths, and opportunities across the service system and the connections among them.
 - Created, administered, and analyzed a healthcare provider survey to identify service needs and gaps; summarized key findings to inform the planning process.
 - Created and administered a needs assessment survey engaging PWLE to better understand the service needs and gaps within the state and inform the priorities of the strategic plan.

- Designed focus groups with PWLE and service providers.
 - Completed a statewide resource inventory to document available services.
- Facilitated virtual, weekly 90-minute planning sessions over 10 weeks with each subcommittee to:
 - Identify the SWOT.
 - Complete a situational analysis to determine the current factors and conditions affecting service delivery.
 - Discuss priority populations and at-risk groups.
 - Identify goals, objectives, strategies, activities, key audiences, responsible parties, time frames, partners/resources, and process measures.
- Developed an implementation and monitoring strategy for the strategic plan.
- Drafted all sections of the strategic plan including executive summary, community engagement and planning process, contributing data sets and assessments, situational analysis, goals and objectives, KPIs, and Monitoring Plan.

BPH was able to submit the five-year plan by the federal deadline and maintain funding levels for critical HIV and HCV services. The selected planning process also enabled BPH to have immediate partner buy-in and support for the implementation phase because the approach prioritized partner input and relationships with an emphasis on a sound methodology to guide the process. Based on their high level of satisfaction with the plan, BPH asked BerryDunn to help support the first year of plan implementation and monitoring.

Tab 4 - Price/Budget (Appendix I – Cost Data/Budget)

Table 2 presents the fees for our proposed work plan, broken down by deliverable, and is inclusive of any related travel expenses. BerryDunn will not charge for time spent traveling, so these costs reflect only the time BerryDunn team members will be working on MDE’s project. We developed our costs based on the following factors:

- Our detailed work plan narrative presented in our proposal.
- Our staffing plan and resource allocation, which provides MDE with the appropriate number of resources and a level of expertise to complete the tasks defined in the RFP.
- Our experience conducting projects of similar scope and size.

Table 2 BerryDunn Cost by Project Phase/Deliverable

Deliverable	Cost
<i>Phase One</i>	
Deliverable 1: Project Work Plan	\$8,771
Deliverable 2: Interested Party Engagement Plan	\$14,731
Deliverable 3: SWOT Analysis and Environmental Scan Report	\$35,806
Deliverable 4: Draft Strategic Plan and Performance Scorecard	\$64,451
Deliverable 5: Final Strategic Plan and Performance Scorecard	\$16,381
Deliverable 6: Final Presentation and Training	\$11,206
<i>Phase Two</i>	
Deliverable 7: Implementation Roadmap and Monitoring and Reporting Plans	\$62,019
Completion of Recurring Administrative Activities (i.e., biweekly status reports and meetings)	\$18,900
Total Cost	\$232,265

BerryDunn certifies that the price submitted was independently arrived at without collusion.

Component 4. Other

Tab 5 - Additional Information

On the following pages, we have included select pages from a previous client's strategic plan as an example of our work. The pages have been redacted.

We have included the following:

- Table of Contents
- Initiative (page 11)
- Initiative 1: People and Culture (page 12)
- Key Results and Supporting Tasks (page 13)

REDACTED



TABLE OF CONTENTS

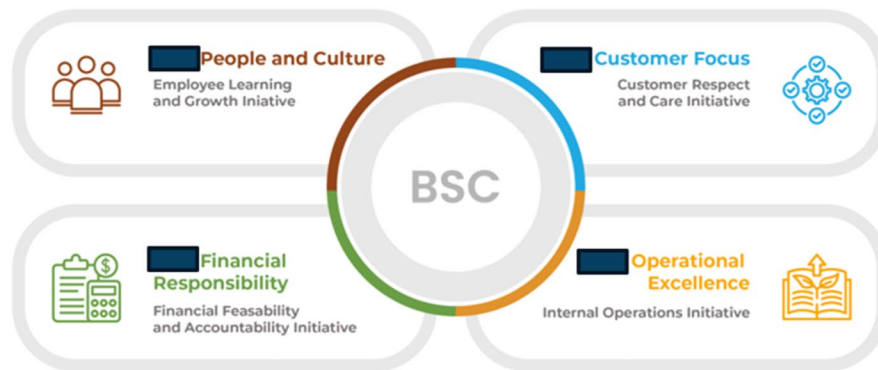
- 01 Acknowledgements
- 02 Alignment and Co-Creation
- 03 Identity, Purpose, and Culture
- 04 Initiatives
 - People and Culture
 - Customer Focus
 - Operational Excellence
 - Financial Responsibility
- 05 Measurement
 - People and Culture
 - Customer Focus
 - Operational Excellence
 - Financial Responsibility
- 06 Other AGENCY-Relevant Strategic Plan Documents
- Appendix A: Contributors
- Appendix B: Acronyms

REDACTED

04 Initiatives

In building this strategic plan, OFFICE recognized that it is imperative to create a set of initiatives—priority areas—that widely reflect the reality of OFFICE's operations. OFFICE outlined relevant and timely strategic objectives (e.g., goals) focused on advancing progress within the initiative areas. This approach is in accordance with the four-quadrant strategic planning best practice model called the Balanced Scorecard (BSC).² Figure 2 below outlines OFFICE's initiatives aligned to BSC priority areas.

Figure 2: OFFICE's Initiatives Aligned to the BSC Best Practice Model



The order of the initiatives provided on the following pages is intentional, demonstrating OFFICE's commitment to operate according to the Chain Reaction of Excellence™³, the researched methodology that differentiates world-class organizations. World-class organizations prioritize their employees first, realizing that engaged, talented, service-oriented employees pay dividends in serving customers. The Chain Reaction™ prioritizes customers' *experience* next, defining *experience* in terms of the totality of interactions they face when interacting with an organization measured according to efficacy, efficiency, and experiences. World-class organizations commit to helping to ensure that their processes, products, and places align to demonstrate the exceptional service experience they promise

² Kaplan, R. S., & Norton, D. P./Harvard Business School. 1996. *The Balanced Scorecard: Translating Strategy into Action*. Boston: Harvard Business School Press.

³ Jones, M. D., & Kober, J. J. 2019. *Lead with Your Customer: Transform Culture and Brand into World-Class Excellence, 2nd ed.* Alexandria, VA: Association for Talent Development.

REDACTED


to their employees and customers. This OFFICE Strategic Plan demonstrates how the OFFICE is committed to continuing to mobilize the Chain Reaction™.

Each initiative includes one or more focus areas and related strategic objectives designed to advance OFFICE's progress. With a strong commitment to progress and quality results, the OFFICE outlines the action items and supporting tasks associated with each strategic objective. Additionally, the OFFICE identifies the qualitative and quantitative measures (e.g., the *as measured by* key performance indicators [KPIs]), timeline, and reporting milestones.

This three-year strategic plan encompasses actions that pertain specifically to the OFFICE Optimization Project—the two-year project initiated in February 20XX—focused on effectively establishing and operationalizing the OFFICE at an accelerated rate. In some cases, there are associated action items and supporting tasks that had been initiated earlier. Action Items 1.1.1, 1.1.2, 1.1.3, 1.4.1, 2.3.2, 3.1.1, 3.3.1, and 3.3.3 include precursor tasks that OFFICE completed.

Table 1 provides the initiative, strategic objectives, and action items for people and culture and represents the start of the initiative and strategic objectives section of the OFFICE Strategic Plan, aligned to the Balanced Scorecard sequence.

Table 1: Initiatives and Strategic Objectives – Initiative 1: People and Culture

 INITIATIVE 1: PEOPLE AND CULTURE
FOCUS AREA: Employee Experience
<p>OFFICE can best support ongoing success for AGENCY by creating and sustaining an engaged, satisfied, directionally clear OFFICE team, contributing their unique talents to achieve meaningful and relevant strategic objectives.</p> <p>The OFFICE's People and Culture Initiative is comprised three strategic objectives focused to optimize OFFICE employees' experience. The 20XX – 20XX prioritized strategic objectives are designed to:</p> <ul style="list-style-type: none">• Develop the OFFICE employees' clarity, confidence, capacity, and capability to conduct their jobs.• Reiterate the value and expectation for developing and maintaining positive partnerships in service to the greater good.• Emphasize OFFICE's intentionality in creating a caring, healthy, and productive culture focused on OFFICE member support.

REDACTED

STRATEGIC OBJECTIVE 1.1: Empower the OFFICE Team (Development).		
	KEY RESULTS AND SUPPORTING TASKS	DUE DATE
	Action Item: Document, communicate, and socialize OFFICE staff roles and responsibilities.	06/10/20XX
	PRECURSOR TASKS	
	1. Define and document OFFICE functions/services.	03/29/20XX
	2. Evaluate roles, responsibilities, and job classifications needed to support the new OFFICE organizational structure.	05/01/20XX
	3. Estimate the number of resources needed within each section of the new OFFICE organizational structure, including additional administrative support for OFFICE leadership.	05/01/20XX
	4. Analyze and document the responsibilities and workload for OFFICE roles.	05/01/20XX
1.1.1	5. Develop the OFFICE staff HR job description templates.	06/26/20XX
	6. Develop draft organizational charts for the OFFICE directors' service areas and submit to executive sponsor for review and feedback.	10/07/20XX
	7. Establish a process to share the OFFICE staff roles and responsibilities with existing and new OFFICE staff (onboarding).	12/09/20XX
	8. Finalize the organizational charts.	12/23/20XX
	SUPPORTING TASKS	
	9. Link the job announcement contents to the positions in the organization charts.	02/10/20XX
	10. Establish process to conduct annual assessment of OFFICE staff roles and responsibilities in March of each year.	06/10/20XX

Tab 6 - Signed Contingent Fee/Acknowledgement of Amendments

Appendix E: Amendment #1 & #2 Acknowledgements



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.


Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: *This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

Date

Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) “Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.”

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6**: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for [2024](#), effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

Date

Printed Name

Appendix F: Assurances and Certification

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

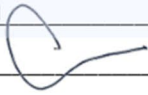
NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Charles Leadbetter

Title: Principal

Signature: 

Date: February 5, 2025

Appendix G: Release of Proposal as Public Record

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. *An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.*

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H: Contracts

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor's current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror's proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

“BerryDunn” is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide professional services in an alternative practice structure in accordance with the AICPA Code of Professional Conduct. BDMP Assurance, LLP is a licensed CPA firm that provides attest services, and Berry, Dunn, McNeil & Parker, LLC, and its subsidiary entities provide tax, advisory, and consulting services.

Berry, Dunn, McNeil & Parker, LLC provides staff and other administrative resources to BDMP Assurance, LLP. If engaged, BDMP Assurance, LLP will lease professional and administrative staff, both of which are employed by LLC, in performing its services. These individuals will be under the direct control and supervision of BDMP Assurance LLP, which is solely responsible for the performance of our engagement.

The entities falling under the BerryDunn brand are independently owned and neither entity is liable for the services provided by the other entity. Our use of the terms “our Firm” and “we” and “us” and terms of similar import denote the alternative practice structure of Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP.

This proposal is the work of BerryDunn and is in all respects subject to negotiation, agreement, and signing of specific contracts.

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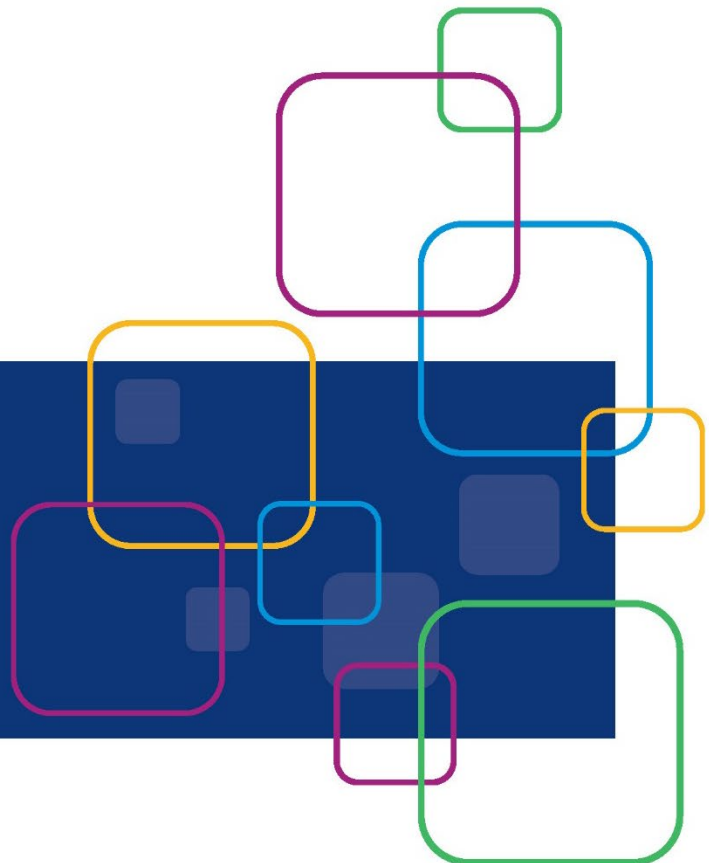
PROPOSAL
RFX No. 3120003047

Mississippi Department of Education

State Board of Education Strategic Planning &
Performance Scorecard

February 5, 2025 | 2:00pm

Monique Corley
Office of Procurement
Mississippi Department of Education
359 North West Street
Jackson, Mississippi 39201



Appendix A – Proposal Cover Sheet

Company/Name: Public Consulting Group LLC

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Anna d'Entremont, Manager
Mailing Address	148 State Street, 10th Floor
City, State, Zip	Boston, MA 02109
Telephone:	617-320-6516
E-Mail Address:	adentremont@pcgus.com

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	(same as above)
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? 3100000248
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature: Anna d'Entremont Date: 2-3-25



February 5, 2025

Mississippi Department of Education
359 North West Street
Jackson, Mississippi 39201

Dear Monique Corley,

Public Consulting Group LLC (PCG) is pleased to submit this proposal to the Mississippi Department of Education (MDE) in response to RFP No. 3120003047 for the State Board of Education (SBE) Strategic Planning and Performance Scorecard. We are excited to have the opportunity to provide project management, facilitation, and strategic planning expertise to support the State of Mississippi in this endeavor.

PCG works in partnership with education agencies across the country to design effective strategic plans by understanding local priorities, defining organizational goals around system capabilities, and developing action plans with recommended measures of success. PCG was founded on a corporate mission of "Solutions that Matter," and today we are one of the largest firms in the nation devoted to providing services to government and educational agencies. PCG has a proven track record in analyzing policies and business processes for efficiencies and improvements in the public sector. We understand the issues that face education organizations and work closely with our client partners to use data to improve programs and outcomes. For over 35 years, our firm has consistently grown in the number of clients we serve and the number of students whose lives we positively impact.

PCG's client commitment and high ethical standards are reflected in our long history of successful projects. We look forward to the opportunity to partner with the Mississippi Department of Education. If you have any questions or wish to discuss potential next steps, please do not hesitate to contact Anna d'Entremont at adentremont@pcgus.com or 617-320-6516. Anna d'Entremont is authorized to represent PCG and bind PCG relative to all matters contained in this proposal.

Sincerely,

A handwritten signature in blue ink that reads "Anna d'Entremont". The signature is written in a cursive, flowing style.

Anna d'Entremont
Manager
Public Consulting Group LLC

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COMPONENT ONE: PLAN OF ACTION

Tab One: Production/Detailed Service Plan

PCG will partner with the Mississippi State Board of Education (SBE) to facilitate, compile, and complete each of the steps toward the development and launch of a new strategic plan and performance scorecard that sets the vision for public education in Mississippi. PCG will manage all aspects of this process to support the development of a multi-year plan that is informed by data, responsive to stakeholder needs, and aligned to best practices. This strategic plan and performance scorecard can and should be used as a key lever to inform and improve achievement across Mississippi.

PCG understands that the Mississippi State Board of Education is comprised of a nine-member appointed board. The Board's role is to set the standards and policies that guide the work of the Mississippi Department of Education (MDE). As part of the policy-setting role, it is the Board's responsibility to oversee the development and oversight of the state's strategic plan for public education.

PCG has reviewed the State Board's current strategic plan and annual status updates. We understand that the last major update to the strategic plan was in 2018, with updated strategies in 2019 and revised outcomes in 2021 to reflect progress. The Board's strategic plan serves as a "roadmap for changing the trajectory of public education in Mississippi." The current plan outlines the objectives and strategies that MDE will undertake to support school districts in achieving the Board's vision of "a world-class educational system."

PCG's Approach to Strategic Planning

PCG works in partnership with education organizations across the country to design effective strategic plans by understanding priorities, defining organizational goals around system capabilities, and developing action plans with recommended measures of success. Our consulting services help organizations build meaningful action plans rooted that support key academic, operational and financial imperatives while incorporating nationally recognized best practices and innovations.

PCG understands education reform must reflect the local context and political realities. PCG supports change management through careful analysis of functions and outcomes. We value strong client relations and believe that a significant component of the work is ongoing and meaningful communication. PCG believes this project, and the updates that will follow offer the State of Mississippi a historic opportunity to move the state's educational system forward. This, in turn, will align with the ultimate goal of improving educational outcomes in districts, schools, and students.

Methodology & Overview

PCG's approach and processes are designed to be inclusive, transparent, and collaborative. Stakeholders are invited to participate throughout the course of development of the strategic plan to ensure that the plan reflects the needs and voices of Mississippians and establishes clarity around the policies and practices that will support success. PCG will employ an engagement methodology which we have successfully used in other projects. Specifically, PCG will:

1. Manage the project and facilitate the planning process.
2. Authentically engage a diverse range of stakeholders in the development of a theory of action and strategic plan.
3. Compile the materials and artifacts to shape documentation for public dissemination.
4. Prepare presentations and facilitate conversations at the beginning and throughout the project.

PCG employs a process built upon an Appreciative Inquiry Model that recognizes that within every organization there are many practices worth preserving and expanding while some others may need to be replaced. By identifying those components, PCG will collaboratively explore what existing practices support

the strategic priorities and consider the new practices that may fit within those priorities. In addition, PCG will use the opportunity to expose potential risks and barriers to success. Throughout the project, PCG will work collaboratively with the State Board to identify major priorities, based on stakeholder values and beliefs, to improve outcomes for Mississippi’s students.

The final Strategic Plan document will communicate the current state of public education in Mississippi, the envisioned future state, and the action steps to achieve the stated goals. The plan will serve to hold MDE accountable for progress made towards these goals.

PHASE ONE Strategic Plan & Performance Scorecard Creation	
Stage One: Initiation & Planning	
1A.	Kick-off Meeting
1B.	Project Work Plan
1C.	Stakeholder Identification
Stage Two: Environmental Scan & Data Collection	
2A.	Review of Existing Documentation
2B.	SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)
2C.	Environmental Scan
2D.	Stakeholder Surveys & Interviews
Stage Three: Strategy Development	
3A.	Mission and Vision Review
3B.	Goal Setting
3C.	Strategy Formulation
Stage Four: Performance Scorecard Development	
4A.	KPI Identification
4B.	Scorecard Design
4C.	Data Collection Mechanisms
Stage Five: Stakeholder Engagement & Workshops	
5A.	Stakeholder Workshops
5B.	Engagement Plan
5C.	Feedback Incorporation
Stage Six: Drafting & Finalizing Strategic Plan	
6A.	Draft Strategic Plan
6B.	Review and Revision
6C.	Final Strategic Plan
Stage Seven: Final Presentation & Handover	
7A.	Presentation to the Board
7B.	Documentation Handover
7C.	Training Session
PHASE TWO Implementation & Monitoring	
Stage Eight: Implementation & Monitoring	

8A.	Implementation Roadmap
8B.	Monitoring and Reporting Mechanism
8C.	Review and Adjustment Protocol

Project Work Plan & Deliverables

The narrative below provides a description of PCG’s approach to the two phases of work to take place over the course of one year. Some work stages across the two phases will occur concurrently.

Stage One: Initiation & Planning

PHASE ONE

Description	Project organization and management
Timeframe	April – May 2025 (or upon execution of the contract)
Deliverables	<ul style="list-style-type: none"> • Project Overview Plan • Stakeholder Identification Plan

(1A) Kick-off Meeting: Conduct a project initiation meeting with key SBE and Board Designees clarify objectives, timelines, and roles.

(1B) Project Work Plan: Develop a detailed project work plan that outlines milestones, timelines, deliverables, and communication protocols.

(1C) Stakeholder Identification: Identify and document key stakeholders (internal and external) to ensure broad engagement and input throughout the process.

Project Launch. Establishing a strong foundation is essential for any successful engagement. PCG will work closely with SBE, Board Designees and MDE leadership to establish a close working rapport. Upon contract execution, PCG will facilitate a virtual kickoff meeting between PCG and SBE Board Designees to review project goals, timelines, and vision for the work.

PCG will provide a slide deck overview of the project work plan, which will act as a roadmap, encompassing high-level actions associated with each scope of service, assigned areas of responsibility, key deliverables, milestones, and the associated timeline. This initial meeting is an opportunity to help make sure PCG and SBE Board Designees on the same page about goals and timeline for the work. Regular project status meetings will serve to update SBE Board Designees on the progress of the deliverables and overall strategic planning process.

PCG proposes project launch and planning meetings in Stage 1 to be conducted virtually.

Project Overview Plan. PCG will prepare a comprehensive project plan that will consist of:

- Project work plan
- Project timeline (including milestones and roadmap)
- Agreed upon metrics of success
- Agreed upon templates for completed materials for distribution
- PCG project management tools and activities

Stakeholder Engagement. PCG will draft a stakeholder identification plan that ensures project transparency and supports two-way communication. PCG assumes that Stakeholder Engagement will include 1:1 or small group interviews with State Superintendent Dr. Evans, MDE executive leaders, and all State School Board members. The plan will also include interviews/focus groups with state policymakers, district superintendents, partners, and other key stakeholders. PCG will also conduct two web-based surveys: 1) a district superintendent survey and 2) a statewide community survey.

The Stakeholder Identification Plan will include:

- Identification of interview participants
- Format and key questions to ask
- Schedule and logistical plans

- Communications materials and language

The Stakeholder Identification Plan will also include a plan for how to disseminate relevant information via the EdUpdate Newsletter, State Superintendent communications, social media, the MDE website, and other relevant channels. The Stakeholder Identification Plan will include the strategy for both initial stakeholder information gathering, as well as plans for ongoing stakeholder input.

Stage Two: Initiation & Planning

PHASE ONE

Description	Document the current state of the MDE and develop an understanding of the organization’s desire for the future
Timeframe	May 2025
Deliverables	<ul style="list-style-type: none"> • SWOT Analysis • Environmental Scan Report

(2A) Review of Existing Documentation: Analyze current strategic plans, performance data, and any other relevant documents to understand the organization’s context.

(2B) SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats): Conduct an analysis to assess internal capabilities and external challenges.

(2C) Environmental Scan: Perform a comprehensive scan of the current educational landscape, including trends, regulations, and technological advancements affecting the state of Mississippi.

(2D) Stakeholder Surveys/Interviews: Collect input from key stakeholders (board members, educators, policymakers, students, and community members) through surveys, focus groups, or interviews.

Develop a Baseline Understanding of the MDE. PCG will develop a baseline understanding of the MDE to inform the strategic plan and performance scorecard. PCG will review current strategic plan practices and progress to explore the gaps between what is and what is desired.

To support this analysis, PCG will develop data and document requests for the MDE to gather existing pertinent information. Wherever possible, publicly available information will be gathered to reduce the effort on the MDE. The data and document list will be refined in collaboration with the MDE. Analysis of these data and documents will help to inform interview questions as well as areas for deeper review. At a minimum, PCG will review:

- State Superintendent’ Annual Reports
- Mississippi Succeeds Plan
- ESSA Consolidated State Plan
- Strengthening Career and Technical Education for the 21st Century Act Four Year Plan
- Data from the Mississippi Succeeds Listening Tour and other similar listening tours
- Data from relevant stakeholder feedback/climate surveys
- Outcomes data, including NAEP and the data metrics outlined in the current Strategic Plan
- State legislation relevant to K-12 education that may impact strategic plan elements

Data elements in the current strategic plan to review include, at a minimum, student proficiency rates, graduation rates, college and career readiness metrics, early childhood participation rates, educator quality and educator shortage data by community, data system access by community, and school and district accountability report card data.

Interviews and Focus Groups. PCG will conduct a series of one-on-one interviews and focus groups with the key stakeholders. PCG has assumed between 25-30 interviews and focus groups. Interview type will vary by role, with each discussion lasting between 30-90 minutes. Interviews will focus on understanding current priorities, future vision and potential constraints from those in state leadership position. Focus groups will be lead through a facilitated visioning activity and a SWOT analysis protocol. Participants will include, at a minimum:

- State School Board members
- State Superintendent and MDE leadership
- Policymakers
- Business leaders
- Advocacy groups
- District Superintendents
- Mississippi Principal Advisory Council
- Mississippi Teacher Advisory Council
- State Superintendent’s Student Advisory Council

Surveys. PCG will administer two surveys to ensure the broadest voice is included in the process.

- **MDE Staff Survey:** PCG will make an electronic response **internal survey** open and available to any MBE staff member. This brief survey will ensure all staff have the opportunity to provide input. The survey will be open for a 3-week period. The survey will ask respondents to identify the strengths, weaknesses, opportunities, and threats they perceive for the MDE.
- **Stakeholder Survey:** PCG will also work with MDE to publish a short, web-based **external survey** to be distributed via social media, the MDE website and other communication vehicles to understand broader external perspectives. The audience for this survey is any interested external stakeholders, including educators, families, students, and community members. PCG recommends that this survey remains open to the public for one month.

Items in the surveys will be clustered to address priority concerns of respondents and will be designed to solicit future looking feedback. The surveys will include common items across all respondent groups as well as items specific to the role/stakeholder group of the respondents. A final open-ended question will be structured to allow survey respondents to share individual concerns or experiences. The stakeholder survey can be offered in multiple languages.

Data Analysis. Upon completion of the qualitative and quantitative data collection process, PCG will analyze and synthesize data as from the focus groups, interviews, and surveys to identify common themes. In addition, analysis will facilitate conversations with the MDE stakeholders in Stage Five, leading to deeper insights and creating an iterative and collaborative process with SBE and MDE. This analysis will be compiled into an **Environmental Scan Report** to be shared with SBE and MDE. The report will be in PowerPoint format, and if desired, can be presented by PCG at a State Board meeting or other venue.

Stage Three & Four: Strategy & Scorecard Development

PHASE ONE

Description	Develop, revise, and vet strategic goals through facilitated sessions and define evaluation of the plan
Timeframe	June – July 2025
Deliverables	<ul style="list-style-type: none"> • Strategic Goals & KPI Determination • Strategy Recommendation Draft • Scorecard Design

(3A) Mission and Vision Review: Facilitate discussions with leadership to revisit or reaffirm the organization’s mission, vision, and core values.

(3B) Goal Setting: Establish long-term strategic goals based on collected data, stakeholder input, and the organization’s vision.

(3C) Strategy Formulation: Develop key strategies and initiatives that address identified needs and opportunities, including those related to educational outcomes, workforce readiness, and technology integration.

(4A) KPI Identification: Develop Key Performance Indicators (KPIs) for each strategic goal, ensuring they are measurable and aligned with the organization’s mission.

(4B) Scorecard Design: Create a performance scorecard that visually tracks progress toward strategic goals. The scorecard should include metrics, targets, timelines, and responsibilities for monitoring and reporting.

(4C) Data Collection Mechanisms: *Identify or create systems for ongoing data collection to measure the effectiveness of strategies and track KPIs.*

Stages Three and Four will be an opportunity to reflect on the data analysis of Stage Two. It is during these combined stages of the work that a vision, mission, and values for the future of public education will be refined through a series of facilitated visioning and work sessions.

Create the Strategic Direction. This phase will be an opportunity for SBE to examine and reflect on the data analysis. It is during this phase of the work that a vision, mission, and values for the future will be refined. This process is completed in facilitated visioning sessions in which SBE gathers to prioritize issues and opportunities as they arise during the process. Moreover, this is the opportunity to refine the vision and shape a theory of action – the proposed way in which changes to the work will lead to changes in the outcomes. This allows SBE to consider its current strengths, address perceived weaknesses, and build towards expected outcomes. These collaborative sessions will draw upon design thinking in which ideas for change are expanded to build a robust set of possible pathways forward with consideration for policies, personnel, accountability, and necessary support structures.

High-level goals will be identified and prioritized in these structured visioning sessions facilitated by PCG. Performance indicators are the metrics that are used to evaluate the factors that are crucial to the success of the organization.

We recommend that all of the above-mentioned visioning sessions be conducted with a one-day onsite planning session (or two consecutive half days) and then virtually over the course of 4-5 sessions between PCG and SBE. PCG has experience conducting these types of sessions virtually and prepares participants by sending materials in advance, facilitating dialogue, and encouraging participation from all members.

PCG will provide work plans, templates, and exemplars to support this work.

Performance Scorecard Design. PCG will work with SBE/MDE to identify the necessary action steps and key performance-based indicators aligned to each goal. In conjunction with the identification of these metrics and development of collection mechanisms, PCG will work with SBE/MDE to visualize the Performance Scorecard that will capture these elements. PCG can visualize the Performance Scorecard in Microsoft Power BI, allowing for the live display of key metrics, timelines, and progress toward goals. The dashboard will be dynamic and filterable, allowing users to track progress both in real time and across different segments of the organization. The Scorecard will be finalized alongside the Strategic Plan in Stage Six to ensure continued refinement and overall cohesion.

Stage Five: Stakeholder Engagement & Workshops PHASE ONE

Description	Comprehensive stakeholder engagement to further refine strategic goals while developing plan for ongoing stakeholder input
Timeframe	July – August 2025
Deliverables	<ul style="list-style-type: none"> Stakeholder Workshops Ongoing Engagement Plan

(5A) Stakeholder Workshops: *Facilitate workshops with board members, educators, and community leaders to gather feedback on the draft strategic plan and performance scorecard.*

(5B) Engagement Plan: *Develop a stakeholder engagement plan to ensure continued involvement throughout the process, from strategy formulation to final approval.*

(5C) Feedback Incorporation: *Revise the strategic plan and scorecard based on stakeholder input and feedback received during workshops*

Stakeholder Workshops: PCG will plan, coordinate and facilitate input sessions with board members, educators and community leaders. PCG will work with SBE/MDE to identify the best method for stakeholder inclusion. PCG assumes these may take on various modalities including both public engagement sessions

and focus group facilitation. PCG will design and facilitate 4-6 stakeholder workshops. While most of these sessions will be in person, we recommend offering some virtual sessions as well. We have found that virtual sessions greatly increase accessibility.

We use an asset-based approach to all of our facilitated sessions, to draw out existing strengths upon which to build. We will use a structured protocol to facilitate these sessions, leading participants through visioning and/or strengths-based planning activities, such as a SOAP analysis (Strengths, Opportunities, Aspirations and Possibilities).

Incorporate Stakeholder Feedback. PCG will work with SDE to incorporate stakeholder feedback into the strategic plan.

Stage Six & Seven: Strategic Plan & Handover

PHASE ONE

Description	Draft, revise, and finalize strategic plan with final presentation to the board
Timeframe	August – October 1, 2025
Deliverables	<ul style="list-style-type: none"> • Draft Strategic Plan and Performance Scorecard • Final Strategic Plan and Performance Scorecard • Final Presentation and Training

(6A) Draft Strategic Plan: Develop a detailed draft of the strategic plan that includes the mission, vision, strategic goals, key initiatives, and performance scorecard.

(6B) Review and Revision: Present the draft to the leadership team for review and make necessary revisions based on feedback.

(6C) Final Strategic Plan: Finalize the strategic plan, ensuring it is a clear, actionable document that includes timelines, responsible parties, and measures for ongoing evaluation.

(7A) Presentation to the Board: Present the final strategic plan and performance scorecard to the board for approval.

(7B) Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.

(7C) Training Session: Conduct a training session for staff on how to use and monitor the performance scorecard to ensure proper implementation.

Draft Strategic Plan and Scorecard. PCG will develop a draft Strategic Plan that will include the Strategic Direction (mission, vision, and values), strategic priorities and goals, metrics for success, and a summary of the planning process. PCG prioritizes the usability and accessibility of information. As such, we will produce a plan with approachable content for all stakeholders. The draft plan will allow SBE to see the core elements of the plan together and envision what the final product will look like.

Create Final Strategic Plan and Scorecard Materials. PCG has a marketing division within the firm. As such, PCG has the capability to produce professional quality marketing materials. As part of the final phase of work, PCG will produce marketing collateral that includes:

- Visioning statement(s)
- Strategic priorities and metrics for monitoring and growth
- Process Summary

Training Session: PCG will conduct a training session for relevant staff on how to use and monitor the performance scorecard. As part of the training session, PCG will provide “how to” written documentation to support future use.

The Steering Committee will be well-positioned to enter Phase Two of the project.

Stage Eight: Implementation & Monitoring

PHASE TWO

Description	Support successful adoption of the plan and develop implementation and monitoring roadmap
Timeframe	October 2025 – April 2026
Deliverables	<ul style="list-style-type: none"> • Implementation Roadmap • Monitoring and Reporting Protocols

(8A) Implementation Roadmap: *Develop a roadmap that outlines the steps needed to implement the strategic plan, including timelines, resources, and responsibilities.*

(8B) Monitoring and Reporting Mechanism: *Create a process for regularly monitoring progress on the strategic plan and scorecard, including tools for tracking KPIs and reporting results to stakeholders.*

(8C) Review and Adjustment Protocol: *Establish a protocol for reviewing and adjusting the strategic plan and performance scorecard as needed to respond to changing conditions or emerging challenges.*

Draft Timeline and Implementation Roadmap. PCG will work with the Steering Committee to develop an implementation roadmap, or action plan, for actualizing the strategic plan over the next five years, including analyzing systems and protocols to leverage the strategic plan for change management.

PCG will spend two days onsite to facilitate a work session around finalizing and developing the implementation roadmap at the start of this phase. Following this work session, PCG will send follow up materials for review and feedback. If needed, PCG will facilitate 2-3 follow-up virtual work sessions to finalize materials development.

The implementation roadmap lays out those specific activities and actions that are required within each strategy. The plans are best pursued when there are clear and specific actions in which clear deliverables are defined. The development of these action plans outlines the various components, high-level activities, and timelines, and identifies responsible individuals required to meet the expectations set forth by the theory of action. Moreover, there needs to be consistent review and evaluation of how the actions and activities are contributing to the outcomes of the model and how stakeholders in the organization can coalesce around the new strategic plan.

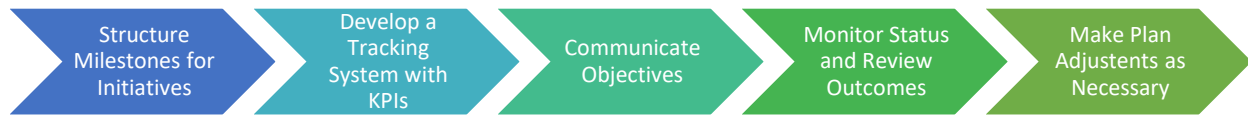
For each goal of the strategic plan there will be action plans to provide guidance around practices and behavior. That is, each element in the model will be the foundation to:

- Parse each into time-bound plans
- Identify actionable steps that will support the realization of the goal
- Identify key personnel responsible for ensuring the success of the goal
- Identify milestones to determine that outputs are produced consistent with the strategy and theory of action
- Identify evaluation metrics to measure the success of each goal (i.e., the aspirational outcome upon which the plan is built)

The completed implementation roadmap will expand upon the previously articulated vision, mission, values, SMART goals, and the theory of action for achieving such outcomes. Associated with the goal(s) will be a set of outcome measures, which the MDE plans to address as part of the plan’s execution. To avoid leaving the theory of action to chance, the plan is also inclusive of strategies, and action steps.

Monitoring and Reporting Processes and Protocols: To ensure SBE is equipped to ensure accountability for the strategic plan and implementation roadmap, PCG will support the Board in developing a monitoring and evaluation framework. In consultation with SBE, PCG will develop tools and metrics for regularly assessing the state’s progress toward achieving its goals. Additionally, PCG will provide a framework (rubrics/protocols) for ongoing evaluation and adjustment of strategies to ensure continuous improvement in desired outcomes. To support the transfer of knowledge, PCG will provide guidance in MDE’s initial use of the tools, metrics, and rubrics.

PCG will equip MDE to engage in the five-step implementation process below, which we have found results in grounded, sustainable change within an organization. Development of these tools will occur through regular project management calls and virtual work sessions.



Project Management

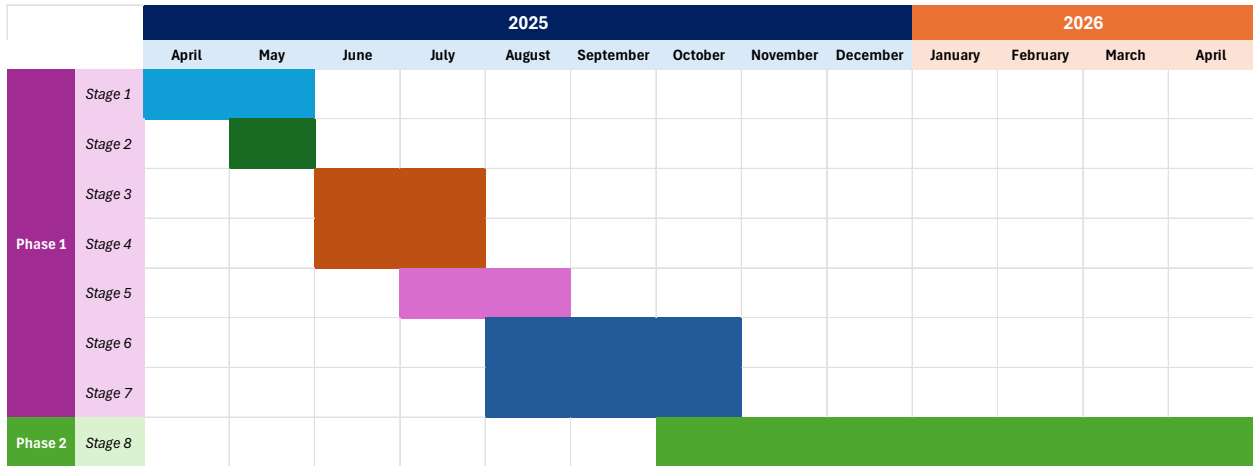
PCG has a proven track record for delivering results on time, and we will apply our project management approach to this scope. Our established processes and quality assurance systems ensure the delivery of high-quality project deliverables. These include procedures for developing detailed work plans and engaging with the client in review of all deliverables. PCG brings the knowledge and capacity necessary for a complex, wide-reaching initiative of this scale. PCG will build in several project controls to ensure timely project communications and decision-making. PCG will establish project management processes and quality assurance systems to ensure a high degree of collaboration and the production of high-quality deliverables. Project management tools, communications processes, and deliverables include:

1. **Project Plan:** The project plan will guide all deliverable development. The workplan will detail timelines and prioritize efficiency in alignment with SBE goals. The plan will be regularly reviewed with SBE/MDE project leadership to ensure project outcomes and responsibilities are clearly stated and mutually agreed upon.
2. **Weekly Project Management Calls:** PCG will hold regular project management calls with the identified MDE project manager. This project management call not only serves to keep us on track but also helps to support proper transfer of knowledge and builds capacity among the MDE project team to continue the work beyond the formal conclusion of the project. Following each call, PCG will send out a status email with identified action items.
3. **Monthly Status Reports:** PCG will prepare monthly written status reports for the Board. The monthly status reports will summarize recent accomplishments, list upcoming action items, and identify project risks and other variables.

PCG believes that a strong project management and communication process will create a seamless, coordinated approach and ensure the work feels like a true partnership.

Proposed Schedule

PCG is prepared to begin work in April 2025. We have proposed a 12-month project plan.



COMPONENT TWO: ADMINISTRATION

Tab Two: Resumes for Key Personnel

PCG will commit an experienced team of consultants and subject matter experts to fully address the requirements of this project. Our team members are process-oriented thinkers with deep content expertise in educational administration and organizational change management. The team background is augmented by PCG’s years of experience facilitating planning, improving systems, and recommending new structures to increase efficacy and better support outcomes for all students across Mississippi.

Detailed resumes for each team member can be found in the [Appendix](#).

Name, Role and Office Location	Project Responsibilities
Anna d’Entremont, Engagement Manager	High-level client communication and overseeing the entire project to completion.
Ana Luiza Archibald, Project Manager	Oversee project team collaboration and delivery of high-quality deliverables and services. Responsible for meeting project goals, keeping the project within the contracted cost and keeping the project within the scope of work.
Lenworth Williamson, Facilitator	Facilitate stakeholder engagement and development of deliverables.
Lauren Monz, Lead Analyst	Support project management, stakeholder engagement and oversee survey dissemination.
Maxwell Macort, Analyst	Support data collection, analysis and visualization, including development of the performance dashboard.

Anna d’Entremont will serve as the **Engagement Manager**, responsible for high-level client communication and overseeing the entire project to completion. Anna brings over two decades of education and management experience to this project and currently oversees PCG’s education strategy portfolio. She has a strong background in understanding the organizational policies and practices essential to support program and process improvement. She has worked with numerous public sector clients across the county, delivering consulting services, including audits, strategic planning, and guiding educational leaders through change management. State-level clients include Alabama, Delaware, Florida, Kentucky, Massachusetts, Minnesota, New Hampshire, Ohio, Rhode Island, and South Carolina among others. Urban school district clients have included Clark County Public Schools, Detroit Public Schools, Newark Public Schools, the School District of Philadelphia, Baltimore County Public Schools, Boston Public Schools, and the Chicago Public Schools.

Anna has a long history working in urban education. Prior to joining PCG in 2008, Anna was the Director of Operations of the Edward W. Brooke Charter School in Boston, MA. In this role, she served as co-director and the operational leader of a high-performing urban charter school. Anna also worked as a Program Officer at New Visions for Public Schools, where she managed a diverse portfolio of initiatives designed to support and develop high school reform and innovation across the New York City Public Schools. In this role, she supported the design and creation of over 100 small high schools throughout New York City as part of the New Century High Schools initiative. Anna began her career as a teacher for the Houston Independent School District and DC Public Schools. She is a Teach for America alumna and completed her Ed.M. in Education Policy from Teachers College, Columbia University. She recently received a certificate in Strategic Transformation in Times of Disruption from the Stanford University Graduate School of Business. Anna received her BA from the University of North Carolina at Chapel Hill.

Ana Luiza Archibald will serve as the **Project Manager**. Ana is an experienced leader who has dedicated her career to unlocking opportunities for historically underrepresented individuals and communities, with a particular focus on educational and workforce access. Throughout her career, Ana has overseen a range of verticals, including Service Delivery, Operations, Strategic Planning, Research and Evaluation, and

Equity and Inclusion, and has significant experience helping cross-functional teams develop and implement innovative strategies. At PCG, Ana's work has included multiple engagements for state education agency program implementations, and state- and district-level functional analyses. Ana's recent projects include *Massachusetts Department of Elementary and Secondary Education (DESE) Organizational Diagnostic Review*; *Massachusetts DESE MyCAP Post-Secondary Pathways Professional Development and Implementation*; *Utah State Board of Education Behavioral Landscape Analysis*; and *Antioch Unified School District (CA) Community Needs Assessment*. Prior to joining PCG, Ana served as President & Chief Operating Officer at Thrive Scholars, an organization that exclusively focused on serving students of color, first-generation students, and students from low-income communities. Ana oversaw unprecedented growth, taking the organization from \$8M to \$20M, tripling the number of students served, and launching new programs that allowed the organization to meet its goals of expanding college and career opportunities for its students. Ana holds a Bachelor's Degree and Master's in Social Work from Boston College. She is a native speaker of Brazilian Portuguese.

Lenworth Williamson, a Senior Consultant with PCG, will serve as a **Subject Matter Expert**. Current clients include the Dekalb County School District (GA) and the New Jersey Department of Education. He has most recently worked as Program Director at BUILD.org, a national education nonprofit focused on youth entrepreneurship, where he oversaw school partnerships in the Greater Boston region and led professional development programming for educators implementing BUILD's project-based entrepreneurship curriculum in the classroom. He's worked closely with school leaders to ensure that BUILD programming aligns well with their particular vision for school success. Prior to BUILD, Len worked at the Pingree School outside of Boston for eight years, as the Dean of Students and a history teacher. He also served as a workshop presenter and conference facilitator on the topics of social justice in education and student motivation. He offered professional development workshops and webinars for educators in school districts across the state through the Massachusetts Partnership for Youth nonprofit, and for five years worked alongside a diverse group of educators from around the U.S. to design and facilitate workshops for 2,000+ high school students at the annual NAIS Student Diversity Leadership Conference. As a volunteer, Len serves on the board of directors for a few youth-serving organizations in Greater Boston to promote equitable access to opportunities for young people from under-resourced communities. He brings a unique perspective, having witnessed first-hand the complex educational challenges and opportunities in both elite private school and urban public school settings. Len earned a B.A. in Sociology from Amherst College and an M.Ed. in Learning & Instruction from Northeastern University.

Lauren Monz is a Consultant with PCG who will serve as the **Lead Analyst**. She is passionate about educational improvement and has focused much of her career on using quantitative and qualitative methods to inform research and solutions in education at both the K-12 and Postsecondary levels. Current PCG clients include the Utah Board of Education, the Delaware Department of Education, and school districts in California, Oregon, and Virginia.

Prior to joining PCG, Lauren worked as a Quantitative Research Analyst with Encoura where she used quantitative analyses to provide colleges and universities with insights into the higher education landscape answering questions around online learning, the impending demographic cliff, program prioritization, and the demand of both adult and traditional learners. Lauren received her Master's in Education Policy from Teachers College at Columbia University. While there, she worked as a student consultant at the Center for Public Research and Leadership where she worked on projects centered on transforming public school systems into learning-centered equity-focused organizations. She received her Bachelor's from Northwestern University in Anthropology.

Max Macort will serve as an **Analyst**. Max is experienced in and passionate about using both quantitative and qualitative data to empower students, educators, and administrators. Recent state education agency clients have been located in Delaware, Kentucky, Utah, and Massachusetts. Prior to PCG, Max worked with a team at the Annenberg Institute to develop an induction program to support early career educators in Rhode Island. Additionally, Max worked on a project with the National League of Cities developing a national dashboard that highlighted neighborhoods that would most benefit from Earned Income Tax Credit (EITC) assistance. Before joining PCG, Max was a youth worker on an urban farm where he planned and led sessions for high school students about urban agriculture and leadership. Max is a service year alum, having served in the Commonwealth Corps before working for the Massachusetts State Service

Commission as a program fellow. There, he supported members' professional development, including designing and leading trainings related to career exploration, interviewing, and resume writing. Max graduated from Brown University with his Master's of Public Affairs, where he specialized in data analysis and visualizations, and holds a Bachelor's from Clark University in Sociology.

Tab Three: References

PCG helps government entities make sound decisions and design better solutions. We have helped numerous state agencies and school districts maximize resources, implement complex new initiatives, and improve outcomes. With our deep expertise in completing high-profile projects across the country, PCG is acutely aware of the constraints often placed on public agencies. We work directly with senior education leaders to solve challenging problems, develop long-term strategies, and support implementation. All fundamental elements to a comprehensive strategic planning process. Our PCG team will apply the knowledge that we have learned over our years of experience to ensure a positive partnership with the MDE.

Listed on the following page are three references from recent clients that can attest to the successful execution of our work. These references highlight PCG's abilities to identify operational and staffing efficiencies in educational settings.

Appendix C - References

Client Name	Alabama Department of Examiners of Public Accounts
Contact Name and Title	Dr. Eric Mackey, State Superintendent
Contact Address	P O Box 30225, Montgomery AL, 36130
Contact Telephone Number	334-694-4902
Email Address	emackey@alsde.edu
Type of work provided to the client	PCG conducted the Alabama State Department of Education Operational Study
Effective contract dates for the time frame services were/are being provided to client	2019-2023

Client Name	North Wasco County School District
Contact Name and Title	Carolyn Bernal, Ed.D, Director
Contact Address	3632 W 10th St, The Dalles, OR 97058
Contact Telephone Number	541-506-3420
Email Address	bernalc@nwasco.k12.or.us
Type of work provided to the client	PCG facilitated the District's 5-year Strategic Plan
Effective contract dates for the time frame services were/are being provided to client	2022

Client Name	University of Florida's Lastinger Center for Learning
Contact Name and Title	Dr. Phil Poekert, Director
Contact Address	618 SW 12th Street - 0711 Norman Hall PO Box 117052, Gainesville, FL 32611
Contact Telephone Number	352-273-4103
Email Address	poekert@coe.ufl.edu
Type of work provided to the client	PCG facilitated the Center's 5-year Strategic Plan
Effective contract dates for the time frame services were/are being provided to client	2022

COMPONENT THREE: PRICE

Tab Four: Price/Budget

PCG is pleased to submit this budget proposal to the Mississippi Department of Education. We are eager to partner with the MDE, and we have priced our proposal to demonstrate that interest. We are confident that we provide the best value for an exceptional level of service.

PCG is fully open to further conversation to refine the project scope to best meet your budget.

Phase 1 of Work		Cost
	Project Work Plan	\$ 7,744
	SWOT Analysis and Environmental Scan Report	\$ 29,048
	Stakeholder Engagement Plan	\$ 44,540
	Draft Strategic Plan and Performance Scorecard	\$ 30,984
	Final Strategic Plan and Performance Scorecard	\$ 21,302
	Final Presentation and Training	\$ 15,492
Phase 2 of Work		Cost
	Implementation Roadmap	\$ 27,111
	Monitoring and Reporting Protocols	\$ 17,429
	TOTAL COST	\$ 193,648

In preparing the approach, timelines, and pricing that is detailed within this proposal, PCG has assumed the following:

- The total cost for Phases 1 and 2 is **\$193,648**.
- PCG has assumed all work occurs between April 2025-April 2026.
- Costs are fully inclusive of all incidentals, travel, and non-salary expenses. Overhead costs are included within PCG's standard rates.
- Work will occur in a hybrid structure, with both virtual and on-site engagements.
- PCG is prepared to begin work immediately.
- PCG has developed a project timeline that ensures a final strategic plan and performance scorecard deliverable by October 1, 2025 with Phase 2 concluding April 2026.

COMPONENT FOUR: OTHER

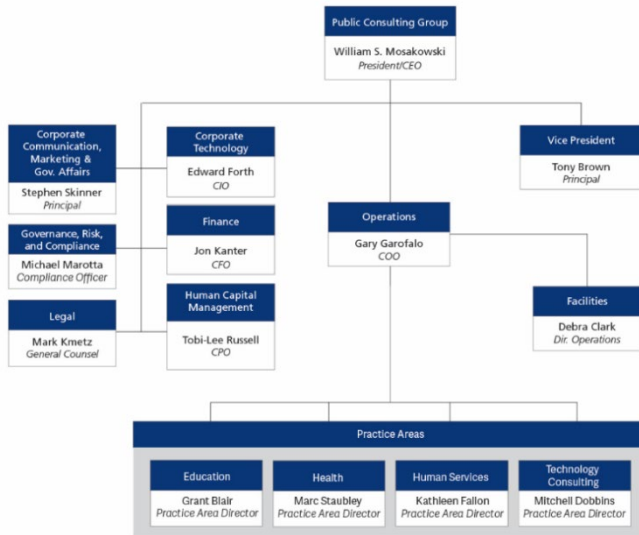
Tab Five: Additional Relevant Information

PCG History

Public Consulting Group, LLC (PCG), is a consulting firm primarily **helping public sector organizations make measurable improvements to their performance and processes.**

PCG was established in 1986 and has been in business for **38 years.** PCG is headquartered in Boston, MA.

With a mission to provide “Solutions that Matter,” PCG’s team includes nearly **2,000 employees** offering strategic planning and implementation, operations improvement, policy development, financial management, systems development, rate setting, revenue maximization, and other management advisory services. We are a privately-owned corporation with consistent leadership since inception.



PCG is structured with designated practice areas, each with deep domain expertise and focused professionals with relevant experience working for federal, state, and local agencies within these respective domains. PCG often combines resources across these practice areas to offer clients a multidisciplinary approach to solving the toughest challenges affecting their respective communities.

Education: Offers consulting services that help schools, districts, and state education agencies improve programs and processes, optimize financial resources, and improve outcomes for students and teachers.

Health: Offers a wide array of consulting services and technologies to help state and local health agencies operate more efficiently and improve service to the populations they serve.

local health agencies operate more efficiently and improve service to the populations they serve.

Human Services: Offers in-depth programmatic knowledge and regulatory expertise to help state and municipal agencies expand program financing options from public and private sources, reduce or contain costs, improve business processes, and promote improved client outcomes.

Technology Consulting: Provides a full spectrum of Information Technology (IT) consulting services to help state and local governments navigate the complete IT lifecycle: from project inception, feasibility, and procurement through to design, implementation, and maintenance and operation.

We have deep experience in managing, executing, and delivering on contracts for audits of state agencies, local governments and officials, special purpose government entities, educational systems, and institutions, and other public or quasi-public entities.

Relevant Project Experience

As a leading education consulting firm, PCG brings national expertise and proven strategies to inform recommendations for organizational efficiency and effectiveness. PCG currently serves 38 State Departments of Education, and 17 of the 20 largest urban school districts.

More than 95% of PCG's clients are public sector agencies or agency providers such as state departments of education; school districts; state and county departments of mental health, developmental disabilities, Medicaid, social services, public welfare; county governments and multi-county entities, cities, and municipalities. The proposed project team focuses solely on education entities, including state education agencies and school districts. PCG has provided relevant work samples in the [Appendix](#).

Our experience working with state education agencies and school districts has made us acutely aware of the constraints often placed on public agencies. We have consistently applied our expertise to support school districts to maximize resources, make better management decisions using performance measurement techniques, streamline business processes, improve federal and state compliance, and improve student outcomes. We deeply understand the necessary inputs that help schools and districts thrive.

Experience developing Strategic Plans

PCG has a proven track record of successful strategic planning for schools, universities, districts, and state departments of education across the country. PCG works partnership with our clients to design effective strategic plans by understanding local priorities, defining organizational goals around system capabilities, and developing action plans with recommended measures of success. Our consulting services help education organizations build meaningful action plans that support key academic and financial imperatives while incorporating nationally recognized best practices and innovations. Descriptions of some recent Strategic Planning projects are included below.

- ***Strategic Plan, University of Florida Lastinger Center for Learning, FL.*** PCG facilitated the development of the Lastinger Center's 5-year strategic plan. PCG's worked with the Center's Leadership Team and Steering Committee to conduct on-site facilitation and work sessions, internal and external stakeholder engagement, and visioning sessions. PCG also conducted action planning and supported the development of implementation roadmaps and timelines to carry out the work outlined in the strategic plan.
- ***Strategic Plan, North Wasco County School District, OR.*** PCG facilitated the development of a 5-year strategic plan for the district. The project included facilitation of the Steering Committee and associated visioning sessions, work group facilitation, interviews, focus groups, data analysis, and benchmarking. PCG also developed an action plan implementation roadmap.
- ***Strategic Plan, David Douglas School District No. 40, Oregon.*** PCG engaged with David Douglas School District No. 40 to carry out district-wide strategic planning. PCG collected stakeholder input by conducting focus groups in English and Spanish and administering a survey in six languages (English, Spanish, Chinese, Russian, Vietnamese, and Somali). PCG also analyzed data and documents to help inform the final project deliverable of a Strategic Plan that was presented to the School Board.
- ***Strategic Plan, Reynolds School District, Oregon.*** PCG facilitated a districtwide Strategic Plan, engaging diverse voices from across the community to inform priority goal areas. PCG conducted focus groups with students, staff, and administrators, as well as with families in English, Spanish, and Russian to capture input. Reynolds School District also engaged with PCG to conduct an ELL audit, a Human Resources audit, and an organizational review.
- ***Work-based Learning Strategy, San Diego Workforce Partnership, CA.*** PCG was hired by the SDWP to conduct a review of the high school internship program for one of the County's largest school districts. A key component of the district's college and career readiness initiative, PCG analyzed the current work-based learning offerings and developed recommendations that would

allow the program to scale and be more accessible to students and business partners in the community.

- **Strategic Plan, Cristo Rey High School, Boston, MA.** PCG facilitated the development of a 5-year strategic plan for a school with an innovative work study model. 100% of students are from families who are low income and 98% identify as students of color. Project included work group facilitation, focus groups, data analysis, and benchmarking.
- **Public School Monitoring Strategic Plan, Massachusetts Department of Elementary and Secondary Education.** PCG provided technical assistance to determine how federal and state public school compliance monitoring could be reimagined to better support improved student outcomes and align to the Commonwealth's larger reform priorities. PCG completed a recommendations report, which included a multi-year implementation plan. The Department re-engaged PCG to develop all documentation and materials for statewide dissemination.
- **Five Year Strategic Plan, Greenwich School District, Greenwich CT.** PCG facilitated the development of a five-year Strategic Plan in partnership with the Greenwich School District. PCG collected and reviewed extensive community and stakeholder feedback, which led to the development of the strategic plan focused on three goals around student growth in academic, personal, and interpersonal development. In addition, PCG collaborated with district staff to complete the logic model and the associated action plans.
- **Elementary School Sustainability Strategic Plan and Roadmap, Roman Catholic Archdiocese of Boston (RCAB).** Collaborated over multiple years with the Roman Catholic Archdiocese of Boston (RCAB) to define their strategic priorities and create a sustainable, long-term operating model for the Archdiocesan elementary schools. The strategic planning process included development of sustainability metrics, analysis of enrollment strategies and a proposed long-term growth strategy. PC planned and facilitated Steering Committee comprised of key community and foundation leaders.
- **Strategic Communications Planning, Holyoke Public Schools, MA.** PCG developed a strategic communications plan for a district under state receivership designed to communicate turnaround strategies with stakeholders including families, community members, students, staff, and prospective teachers.

Experience with SEA and LEA strategy development

PCG works directly with senior education leaders to solve challenging problems, assess climate, develop long-term strategies, guide organizational change and support implementation.

- **Alabama State Department of Education Organizational Study and Strategy to Action Plan Creation, Department of Examiners of Public Accounts, AL.** PCG conducted an organizational analysis of Alabama's state education agency, an analysis requested by the state legislature with a lens towards improved student success. PCG made recommendations for improvements to policies, programs, funding, culture, and organizational structure across all agency functions in this high-profile, political, and complex project. The State of Alabama reengaged with PCG to lead the creation and oversight of a *Strategy to Action Plan* to drive short and longer-term reform efforts based on our recommendations. This plan and accompanying tools focused and prioritized all work of the ALSDE, with the end goal of improved student outcomes. PCG provided monitoring support to ensure implementation fidelity and timelines. PCG also provided monthly status reports, quarterly written progress assessments and regular in person presentations to the state legislature and to the Governor's office. This phase of the work included weekly regular strategic advising and technical assistance to the State Superintendent and his senior leadership team.
- **Culture and Climate Analysis, Clark County School District, NV.** PCG was hired by Clark County School District to investigate and analyze how District leadership and Board of Trustees

practices impact decision-making and the overall culture of the District and identify opportunities for improved practice. The study goal is to improve the overall climate, management, functions, and outcomes of CCSD students and schools. There was a substantial stakeholder perception data collection component to this project, including 38 stakeholder focus groups and a districtwide staff survey in spring 2023, all contributing to the creation of a comprehensive action plan. The staff survey received over 11,700 responses. CCSD hired PCG to continue to support district-wide survey administration this spring. Clark County is the fifth largest school district in the county, with over 300,000 students.

- ***Strategic Communications Plan, School District of Philadelphia, PA.*** PCG was hired to develop a Strategic Communications Plan for the Board of Education in support of documenting key messaging, goals, metrics, and action steps to help make the Board more transparent and accessible to the District community. PCG conducted stakeholder engagement including interviews, focus groups, and a community survey—that extended citywide—to inform recommendations and plan content. PCG also facilitated working sessions with Board members and their staff.
- ***Comprehensive Organizational Diagnostic Review and Analysis, Massachusetts Department of Elementary and Secondary Education, MA.*** PCG is currently conducting a comprehensive organizational diagnostic review and analysis of the Massachusetts Department of Elementary and Secondary Education. PCG is assessing the strengths, weaknesses, and opportunities for improvement in the state education agency's existing organizational structure, processes, funding systems, staffing, and stakeholder experience. PCG interviewed and surveyed Department staff, engaged external stakeholders in focus groups and an external survey, as well as conducting a comparative analysis of best practices of other state education agencies in order to deliver actionable recommendations the Department. PCG received over 2,000 responses to the statewide community survey.
- ***Audit of the Kentucky Department of Education, Kentucky Auditor of Public Accounts, KY.*** Under the Kentucky Auditor of Public Accounts, PCG is providing education subject matter expertise to support an audit of the Kentucky Department of Education. The review was requested by the state legislature with the goal of assessing KDE's operational effectiveness in the schools, departments, projects and other initiatives that it oversees. The work includes comprehensive stakeholder feedback from agency staff, LEA superintendents statewide, and State Board of Education members. It also includes reviewing documents, conducting comparison state research, and analyzing student outcomes data. PCG conducted four stakeholder surveys as part of this scope.
- ***Systems and Process Review, South Carolina Department of Education, SC.*** PCG engaged with SCDE to conduct an operational review that assesses the operations, financial structure, human capital, and accounting of the SCDE. The review included comprehensive stakeholder feedback from agency staff and LEA Superintendents statewide, including over 100 focus groups and interviews. The scope also included a survey for all SCDE staff. PCG worked closely with agency leadership to assess organizational operations and management and areas for improvement. PCG delivered a final report and provided technical assistance based on the report's recommendations.
- ***Comprehensive Access and Opportunity Audit, Dekalb County School District, GA.*** PCG was hired to conduct a Comprehensive Access and Opportunity Audit for DCSD to improve educational outcomes through the creation of equitable policies, practices and experiences for all members of the school community. In the audit, PCG is focused on the domains of Organizational Leadership and Policy, Family and Community Engagement, Instructional and Programmatic Equity, Resource Allocation, School Climate, and Professional Learning. PCG's work includes significant stakeholder

engagement, including focus groups, interviews, and a survey that received over 23,000 responses. The final deliverables include: audit report and recommendations roadmap, summary presentation, equity action plan, monitoring and evaluation framework and an equity policy.

- **Special Education Costs Analysis, NOLA Public Schools, LA.** PCG was contracted to conduct a fiscal analysis of special education costs across charter schools and organizations to inform potential consolidation efforts in NOLA Public Schools. PCG analyzed demographic data from the District Level Funding Allocation for 58 sites to assess student population trends, conducted a stratified sampling process to analyze staffing and caseload data for five large CMOs, three small CMOs, and seven single sites, analyzed Annual Financial Reports for 57 sites, or approximately 80 percent, of all charter schools, and analyzed documents and guidance related to financial reporting, including accounting code descriptions, differentiated funding reports, and other general information about special education funding in the district. A final report was provided to the client summarizing per-pupil expenditure cost for supporting students with disabilities along with recommendations for improvements to financial reporting, streamlining CMO data collection, and areas for deeper analysis.
- **Education Equalization Funding Formula, Delaware Department of Education, DE.** PCG was contracted by the Delaware Department of Education (DDOE) to assess the effectiveness of the State's current education equalization funding formula and propose changes to fairly address the issue of disparate property tax bases between school districts. PCG is analyzing the efficacy of the current formula, engaging key stakeholders, and conducting a landscape analysis of other states' equalization mechanisms in order to assess relative strengths, weaknesses, and areas for improvement in Delaware. PCG will then take the upcoming property reassessments and incorporate them into an updated formula. Finally, PCG will provide DDOE with recommendations on maintaining the formula and will support the implementation of the proposed recommendations.
- **Operations and Facilities Analysis, Missouri Department of Elementary and Secondary Education, MO.** The Missouri Department of Elementary and Secondary Education (DESE) contracted with PCG to conduct a thorough Operations and Facilities Analysis of its state-operated Missouri Schools for the Severely Disabled (MSSD). This was part of a two-phase project in which DESE and PCG partnered to conduct a comprehensive analysis of 34 schools that included MSSD operations, facilities, fiscal management, educational adequacy, and instructional practices for their state-operated program serving students with significant disabilities. The approach, methodology, and work plan for this study was created based on feedback from the State Board of Education which sought to understand the best path forward for MSSD operationally and how students within this program could be effectively served to achieve the greatest outcomes. DESE reengaged with PCG to lead the second phase of the project to include an operational review of the remaining 28 facilities and included a comprehensive instructional review to better understand how students within MSSD were supported in alignment with best practices for working with students with significant disabilities. A Long-Range Advisory Planning Committee was included in the scope of this work to garner stakeholder engagement and support final recommendations regarding MSSD to the State Board of Education.
- **School District Monitoring and Support, Ohio Department of Education and Workforce, OH.** PCG worked with the Ohio Department of Education and Workforce to build the Department's capacity for coherent and streamlined processes to decrease work duplication through monitoring and support of Ohio's schools and districts. PCG facilitated interviews and focus groups with district superintendents, community school leaders, State Support Team leaders, and agency staff to inform this work.

Tab Six: Appendix E, Amendments

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Anna d'Entremont

2/3/25

Authorized Signature

Date

Anna d'Entremont, Manager

Printed Name

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Anna d'Entremont

2/3/25

Authorized Signature

Date

Anna d'Entremont, Manager

Printed Name

Request for Proposal
Strategic Planning and Performance Scorecard-REISSUE
RFX No. 3120003047
Amendment Number Two

APPENDIX

Appendix F

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor’s bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The Offeror represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s bid or proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY
Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

name: Anna d'Entremont

title: Manager

signature: Anna d'Entremont Date: 2/3/25

Modifications or additions to any portion of this document may be cause for rejection of the bid

Appendix G

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not ()** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Public Consulting Group does not have a current contract with the MDE.

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Certificate of Good Standing



Michael Watson
SECRETARY OF STATE

Office of the Secretary of State
Jackson, Mississippi

Certificate of Good Standing

I, MICHAEL WATSON, Secretary of State of the State of Mississippi, and as such, the legal custodian of the records as required by The Mississippi Registration of Foreign Limited Liabilities Company Act to be filed in my office do hereby certify:

PUBLIC CONSULTING GROUP LLC

Registered the 31st day of October, 2002

A Delaware LIMITED LIABILITY COMPANY has filed the necessary documents in this office and has obtained a certificate of registration to do business in this state, under the provisions of The Mississippi Registration of Foreign Limited Liability Companies Act as shown by the records in this office.

I further certify that said Limited Liability Company has filed in this office an appointment of registration for service of process, with written acceptance endorsed thereon, and/or power of attorney, designating its agent and/or attorney for service of process in this State as:

C T CORPORATION SYSTEM
645 LAKELAND EAST DR STE 101
FLOWOOD, MS 39232

I further certify that said Limited Liability Company has paid the fees for filing the above papers required by law as shown by the records of this office, and that said Limited Liability Company is in good standing to do business in Mississippi at this time.

Given under my hand and seal of office
the 3rd day of January, 2025

Certificate Number: CN25203566

Verify this certificate online at <http://corp.sos.ms.gov/corpcnv/verifycertificate.aspx>

Resumes

ANNA D'ENTREMONT

Manager
Public Consulting Group LLC

Relevant Project Experience

ALABAMA STATE DEPARTMENT OF EDUCATION OPERATIONAL STUDY

Department of Examiners of Public Accounts

Operational analysis of Alabama's state education agency at request of the state legislature. PCG made recommendations for improvements to policies, programs, funding, and organizational structure across all agency functions in this high-profile project. The State of Alabama has since reengaged with PCG to lead the creation of a *Strategy to Action Plan* to drive short and longer-term reform efforts. This phase of the work includes providing regular strategic advising and technical assistance to the State Chief and his senior leadership team.

INTERSTATE MERGER FEASIBILITY STUDY

Clarksburg, MA and Stamford, VT

Feasibility study for an interstate merger between two rural school Districts in Vermont and Massachusetts, a first between these two states. PCG was charged with presenting multiple options for District consolidation and reorganization across state lines. The study reviewed the impact on all key functions. The two communities reengaged with PCG in fall of 2019 to offer continued implementation guidance.

COORDINATED PROGRAM REVIEW TECHNICAL ASSISTANCE

Massachusetts Department of Elementary and Secondary Education

Technical assistance to determine how federal and state special education compliance monitoring could be reimagined to better support improved student outcomes and align to the Commonwealth's larger reform priorities. Data collection included: interviews, focus groups, statewide survey of special educators and an analysis of other state practices.

STRATEGIC ROADMAP

Roman Catholic Archdiocese of Boston (RCAB)

Collaborated over multiple years with the Roman Catholic Archdiocese of Boston (RCAB) to define their strategic priorities and create a sustainable, long-term operating model for the Archdiocesan elementary schools. The strategic planning process included development of the School Sustainability Index, an analysis tool designed to determine the extent to which each school is meeting targets within six categories.

PROFILES ANALYSIS

Massachusetts Executive Office of Education

Served as project director comprehensive review of Massachusetts site for state education data, known as Profiles. Conducted focus groups, interviews, and web use sessions with key stakeholders to gauge current and future use of system. Developed recommendations for state to improve public access and engagement using high quality and relevant data.

STRATEGIC COMMUNICATIONS PLANNING

Holyoke Public Schools

Developed a Strategic Communications Plan for Holyoke Public Schools (HPS) designed to communicate turnaround strategies with stakeholders including families, community members, students, staff, and prospective teachers. Communications plan components included a press strategy, social media strategy, crisis communications strategy, family communications strategy, and an inventory of all communications vehicles operating within the District.

STATEWIDE REVIEW OF EDUCATIONAL OPPORTUNITIES**Delaware Department of Education**

Produced a comprehensive report to support informed decision making of Delaware's future school capacity needs, taking into account the specific needs of diverse and at-risk learners. Drew from multiple data sources, including national best practices, community feedback and demographic projections of Delaware's schools, to develop a comprehensive understanding of projected gaps and future needs in schooling options for all of Delaware's students. Stakeholder outreach included a statewide survey, interviews and community focus groups. This was a follow up project based on initial work completed for the state. Phase 1 included creating an inventory of all schooling options available to students across the state of Delaware.

CONSULTANT TO SUPPORT STRATEGIC PLAN DEVELOPMENT**Greenwich Public Schools**

Facilitated the development of the District's 5-year strategic plan, led by the School Board. Data collection included: focus groups, community forums, benchmarking and a community survey. District action planning yielded a detailed strategic roadmap to guide strategic plan implementation. At project close, the District reengaged with us to for additional facilitation and data collection support related to their family engagement and outreach strategy.

STUDENT EXPERIENCE SURVEY**Minnesota Office of Higher Education**

Served as the Project Director in the creation of a survey instrument to measure current and former students' perceptions related to their educational experience and the information provided to them by the postsecondary institution they attended. Worked with MN OHE and representatives of the institutions in order to gather information related to marketing and recruitment practices, student debt, job placement following completion of coursework, etc. Final report analyzed survey results, positive observations, areas of concern, and recommendations for action.

CONSULTING AND TECHNICAL ASSISTANCE FOR IMPLEMENTATION OF SCHOOL BASED BUDGETING PROGRAM IN SPECIAL EDUCATION**Chicago Public Schools**

Provided consultative expertise and technical assistance with implementing a school-based budgeting (SBB) model for special education. Analyzed budgetary information and programmatic data, in addition to feedback from the pilot schools, and will revise the existing funding formula.

OPERATIONAL REVIEW OF THE OFFICE OF SPECIAL EDUCATION**Newark Public Schools**

Performed an operational review of the Office of Special Education (OSE) in order to determine the operational effectiveness in supporting positive outcomes for students receiving special education services, and to identify areas of strength and areas for improvement in the organization and delivery of services.

DEVELOPMENT OF EDUCATION DATA WAREHOUSE**Massachusetts Executive Office of Education**

Served as a subject matter expert on K-12 and Postsecondary education during the development of the P20 data warehouse. Facilitated meetings with state agency data analysts and program staff. Developed and conducted focus groups with educators across the state for the purpose of identifying end user requirements and preferred data dashboard models.

Previous Professional Experience

EDWARD W. BROOKE CHARTER SCHOOL, ROSLINDALE, MA Served as co-director and the operational leader of a high-performing K-8 urban charter school. Supervised all non-

- Director of Operations***
2007-2008

instructional school staff. Oversaw all day-to-day school operations. Managed all school operational budgets. Developed systems and streamlined pre-existing ones to increase school efficiency and ensure long-term vitality.
- NEW VISIONS FOR PUBLIC SCHOOLS, NEW YORK, NY**
Policy Officer, Special Projects
2004-2007

Managed a diverse portfolio of initiatives designed to support 85 new small high schools in the New Century High Schools Initiative, including: teacher recruitment and induction; school facilities; budget practice; and data management. Offered on-going technical assistance to administrators for staffing and other operational needs. Acted as a liaison between small school administrators and appropriate New York City Department of Education offices.
- NATIONAL CENTER FOR CHILDREN AND FAMILIES,**
NEW YORK, NY
Graduate Research Assistant
2003-2004

Assisted with both qualitative and quantitative data collection efforts for the National Head Start Quality Research Project.
- POWELL ELEMENTARY SCHOOL, WASHINGTON, DC**
Second Grade Teacher, ESL Inclusion
2002-2003
- FRANKLIN ELEMENTARY SCHOOL, HOUSTON, TX**
Bilingual Kindergarten Teach
2000-2002

Voted school's Teacher of the Year, 2001-2002.
- TEACH FOR AMERICA, NEW YORK, NY**
Houston Corps Member
2000-2002

Served as member of national teaching service corps who commit to teach in under-resourced public schools.

Education

Teachers College, Columbia University
 Master of Education Degree in Education Policy

University of North Carolina at Chapel Hill
 Bachelor of Arts Degree in International Studies

ANA ARCHIBALD*Senior Consultant*
Public Consulting Group LLC**Relevant Project Experience****EQUITY IN CTE****New Jersey Department of Education**

PCG was hired to by the New Jersey Department of Education (NJDOE) and Office of Career Readiness (OCR) to provide ongoing research, resources, and professional development centered around the Strengthening Career and Technical Education and equity and access for special population students. PCG will design and facilitate data-driven workshops, and disseminate research and resources on equity throughout New Jersey's CTE programs, including secondary and post-secondary institutions.

ORGANIZATIONAL REVIEW**Massachusetts Department of Elementary & Secondary Education**

PCG is currently conducting a comprehensive organizational review to assess how the structures, policies, and practices of the Massachusetts Department of Elementary and Secondary Education (DESE) support or impede the agency's efficacy and efficiency. The work includes a robust review of agency documents and data and comprehensive stakeholder feedback from hundreds of agency staff and LEA leaders across the Commonwealth. PCG's deliverables will include a report of findings and recommendations.

COMPREHENSIVE ACCESS & OPPORTUNITY AUDIT**DeKalb County School District, Georgia**

PCG was hired to conduct a Comprehensive Access and Opportunity Audit for DCSD to improve educational outcomes through the creation of equitable policies, practices and experiences for all members of the school community. In the audit, PCG is focused on the domains of Organizational Leadership and Policy, Family and Community Engagement, Instructional and Programmatic Equity, Resource Allocation, School Climate, and Professional Learning. The final deliverables include: audit report and recommendations roadmap, summary presentation, equity action plan, monitoring and evaluation framework and an equity policy.

MyCAP PATHWAYS PROFESSIONAL DEVELOPMENT**Massachusetts Department of Elementary & Secondary Education**

PCG has recently engaged with MA DESE to provide professional development related to MyCAP (My Career & Academic Plan), a student-centered multi-year planning tool designed by the state to provide students with opportunities to plan for college and career readiness. In this engagement, PCG is facilitating trainings, professional development workshops, and coaching & technical assistance across the state over the next three years.

LANDSCAPE ANALYSIS REGARDING BEHAVIOR IN UTAH SCHOOLS**Utah State Board of Education**

PCG worked with the Utah State Board of Education (USBE) to conduct a landscape analysis of the behavior management systems and policies in Utah schools. PCG identified relevant strengths, weaknesses, opportunities, and threats to the way that Utah schools and community partners currently handle student behaviors, as well providing recommendations as to how the state can better support districts.

COMMUNITY ASSET & NEEDS ASSESSMENT**Antioch Unified School District, California**

PCG was hired by AUSD to conduct a Community Asset and Needs Assessment, which serves as a blueprint for how the District moves forward with its Community Schools model, as defined and funded by the California Community Schools Partnership Program Planning Grant. As part of the Assessment, PCG conducted an in-depth canvas of school and community stakeholders, leveraging surveys,

interviews, and focus groups, to determine assets, existing resource gaps, and articulated needs. The final deliverables included a summary of data collected, a set of recommendations, and an implementation roadmap. At the conclusion of the assessment, AUSD hired PCG to support with the application for a Community Schools implementation grant.

STAFFING AUDIT

Clark County School District, Nevada

PCG partnered with CCSD to conduct an organizational audit to better understand the current staffing model and structures within the Central Office. The goal of this audit was to improve internal efficiencies and operational excellence, and to ensure the Central Office is appropriately structured to support CCSD’s strategic priorities. PCG analyzed organization structures through reviews of organizational charts, personnel reports, and job descriptions and produced a report containing findings and recommendations to improve district efficiency and effectiveness through changes to the organizational structure and internal practices.

Previous Professional Experience

- | | |
|---|--|
| <p>THRIVE SCHOLARS,
BOSTON, MA
<i>President & Chief Operating Officer</i>
2021-2023
<i>Chief Operating Officer</i>
2019-2021</p> | <p>Served as the internal leader of the organization as Thrive grew from 18 to 80 staff, from \$4MM to \$20MM and from four regions to eight. Oversaw Program; Operations; Talent; Finance; Research & Evaluation; and Equity and Inclusion. Supervised a team of 6 Chiefs and Managing Directors and oversaw a \$20MM budget. Managed the Strategic Planning process, including board and partner engagement. Led planning and implementation that enabled the organization to triple the number of students served while maintaining strong programmatic outcomes, including top college attendance, academic achievement, and earnings upon graduation.</p> |
| <p>THRIVE SCHOLARS,
BOSTON, MA
<i>Chief Program Officer</i>
2018-2019
<i>Director of Programs</i>
2016-2018</p> | <p>Oversaw national program delivery, including leadership of 5 growing program teams (Recruitment, College Access, College Success, Mentorship, and Career Development). Scaled program nationally and launched program innovations, including a residential academic summer program and industry-specific career development programming.</p> |
| <p>BIG SISTER ASSOCIATION OF
GREATER BOSTON, BOSTON,
MA
<i>Manager, Community-Based Mentorship</i>
2012-2016</p> | <p>Led all clinical and operational areas of program, surpassing annual growth and quality goals. Managed a team of 17 staff to effectively support over 1,400 mentoring matches annually. Designed and implemented program evaluation measures for individual performance management and for program development. Implemented and oversaw specialized initiatives, including mentee scholarship program, youth enrichment events, child safety task force, and volunteer engagement task force.</p> |

Education

Boston College School of Social Work
 Master of Social Worker

Boston College
 Bachelor of Arts, Major in Sociology
 Phi Beta Kappa, Magna Cum Laude

Professional & Personal Skills

- **Native Speaker of Brazilian Portuguese, proficient in Spanish**
- **Salesforce, Tableau, Asana Project Management**
- **Strategic Planning**
- **Organizational Development**
- **Project Management**

LENWORTH WILLIAMSON	Senior Consultant Public Consulting Group LLC
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Relevant Project Experience

AUDIT OF THE KENTUCKY DEPARTMENT OF EDUCATION

Kentucky Auditor of Public Accounts

Under the Kentucky Auditor of Public Accounts, PCG is providing education subject matter expertise to support an audit of the Kentucky Department of Education. The review was requested by the state legislature with the goal of assessing KDE's operational effectiveness in the schools, departments, projects and other initiatives that it oversees. The work will include comprehensive stakeholder feedback from agency staff, LEA superintendents statewide, and State Board of Education members. It will also include reviewing documents, conducting comparison state research, and analyzing student outcomes data.

EQUITY IN CTE

New Jersey Department of Education

PCG was hired to by the New Jersey Department of Education (NJDOE) and Office of Career Readiness (OCR) to provide ongoing research, resources, and professional development centered around the Strengthening Career and Technical Education and equity and access for special population students. PCG will design and facilitate data-driven workshops, and disseminate research and resources on equity throughout New Jersey's CTE programs, including secondary and post-secondary institutions.

COMPREHENSIVE ACCESS & OPPORTUNITY AUDIT

DeKalb County School District, Georgia

PCG was hired to conduct a Comprehensive Access and Opportunity Audit for DCSD to improve educational outcomes through the creation of equitable policies, practices and experiences for all members of the school community. In the audit, PCG is focused on the domains of Organizational Leadership and Policy, Family and Community Engagement, Instructional and Programmatic Equity, Resource Allocation, School Climate, and Professional Learning. The final deliverables include: audit report and recommendations roadmap, summary presentation, equity action plan, monitoring and evaluation framework and an equity policy.

Previous Professional Experience

- | | |
|--|--|
| <p>BUILD.org,
BOSTON, MA</p> <p><i>Program Director</i>
2022-Present</p> | <p>National education nonprofit focused on youth entrepreneurship (grades 7-12)</p> <ul style="list-style-type: none"> • Provide trainings and coaching for a diverse cohort of educators on the implementation of a project-based entrepreneurship curriculum • Manage a program team of five full-time staff with weekly check-ins, regular performance reviews, and clear professional development expectations • Seek and develop mission-aligned partnerships with local community-based organizations • Cultivate a professional culture characterized by a sense of belonging, trust, effective communication, collaboration, and a commitment to overall excellence • Relationship-building with constituent groups, including school leaders, district administration, teachers, board members, volunteers, corporate partners, students, and alumni |
|--|--|

- Identify enrichment opportunities to support students' college and career readiness
- Collaborate with national team leadership to design and implement innovative program elements and evaluation methods to improve organizational outcomes
- Foster a data-informed culture of inquiry through regularly gathering and analyzing both quantitative and qualitative data to guide regional strategy and decision-making
- Administer regional data collection processes to ensure accurate reporting and reflection on region's overall progress, performance, and trends
- Plan and facilitate program expansion and regional growth
- Manage \$1.4M regional program budget
- Participate in funder meetings with Executive Director and Director of Philanthropy, and provide assistance in fundraising efforts
- Oversee the planning and execution of regional events

**PINGREE SCHOOL,
 SOUTH HAMILTON, MA**
*Dean of Students; History
 Teacher*
2014-2022

Co-ed independent day school serving 400+ students (grades 9-12)

- Oversaw student life programming, including advising, student leadership, discipline, clubs and activities, events, and field trips
- Managed four Grade Deans and 50+ advisors
- Designed and implemented innovative student programming, including a gamified rewards system to boost school spirit, build social connections, and promote friendly competition
- Led and participated in committees to address student safety, well-being, and sense of belonging
- Annually reviewed and revised student and faculty handbook policies in collaboration with senior administrators
- Taught 9th grade and 12th grade history classes on a range of topics including Nonviolent
- Resistance and Music & the Human Experience
- Independently organized a fundraising campaign and raised \$15,000 for the boys and girls varsity basketball teams to play in a tournament at the TD Garden in Boston

**PERSONAL FITNESS TRAINER &
 BASKETBALL COACH,
 GREATER BOSTON AREA, MA**
Self-Employed (Part-Time)
2014-2016

- Gained personal fitness trainer certification and trained middle school and high school basketball players
- Coached varsity and junior varsity high school boys basketball teams

**PROFESSIONAL BASKETBALL
 PLAYER, EUROPE
 & MIDDLE EAST**
Luxembourg & Kuwait
2013-2014

- Played for BBC Etzella Ettelbruck and Al Sahel Basketball Club

Education

Amherst College

Bachelor of Arts in Sociology, cum laude

Achievements:

- Departmental Honors awarded for Senior Thesis in Sociology, a 120-page research paper about the history of technological changes impacting the U.S. music industry
 - Captain of Amherst College Men’s Basketball Team
- 2013 NCAA Division III National Champions
- Awarded Most Outstanding Player of the Final Four
 - Amherst College Athletics: Eugene Wilson Award
 - “Presented to the student-athlete who, through determined effort and sportsmanship, most embodies the spirit of Amherst athletics”

Northeastern University

Master of Education

College of Professional Studies, Learning & Instruction

Capstone Project

Created Dream Teamz, a program designed to help kids develop social-emotional learning skills, like leadership and teamwork, in a fun and competitive environment

Institute for Nonprofit Practice

Certificate: Social Impact Management and Leadership

A nine-month leadership development program for nonprofit professionals, focused on effective management, fundraising best practices, and shaping organizational culture.

Presentations

WORKSHOP FACILITATOR
Experienced workshop presenter for educators, students, and parents, both in-person and virtual (2019 – Present)

- Five years of facilitation experience at the annual NAIS Student Diversity Leadership Conference for 2,000+ high school students
- Presented 10+ workshops to K-12 educators through the Massachusetts Partnerships for Youth nonprofit, on the topics of social-emotional learning and equity and inclusion in schools

Nonprofit Boards

- YMCA of Cape Ann | 2023 - Present
- The Valedictorian Project | 2023 - Present
- Brookwood School | 2022 - Present
- Aaron’s Presents | 2020 - 2023

LAUREN MONZ**Consultant**
Public Consulting Group LLC

Relevant Project Experience

STATEWIDE EQUALIZATION FORMULA ASSESSMENT

Delaware Department of Education

PCG is working with the Delaware Department of Education (DDOE) to assess the effectiveness of the State's current equalization funding formula. PCG is providing DDOE with recommendations on how to ensure that equalization funds are equitably and accurately allocated across the state, as well as supporting the implementation of the proposed recommendations.

LANDSCAPE ANALYSIS REGARDING BEHAVIOR IN UTAH SCHOOLS

Utah State Board of Education

PCG worked with the Utah State Board of Education (USBE) to conduct a landscape analysis of the behavior management systems and policies in Utah schools. PCG identified relevant strengths, weaknesses, opportunities, and threats to the way that Utah schools and community partners currently handle student behaviors, as well providing recommendations as to how the state can better support districts.

COMMUNITY NEEDS ASSESSMENT

Antioch Unified School District

PCG was hired by AUSD to conduct a Community Needs Assessment, which serves as a blueprint for how the District moves forward with its Community Schools model, as defined and funded by the California Community Schools Partnership Program Planning Grant. As part of the Assessment, PCG conducted an in-depth canvas of school and community stakeholders to determine existing resource gaps as well as articulated needs. The final deliverables include a summary of data collected, a set of recommendations, and a presentation shared with stakeholders and the District's Board of Trustees.

COMMUNITY NEEDS ASSESSMENT

North Wasco County School District

PCG was hired by NWCS D to conduct a comprehensive assessment of family and community engagement practices to better understand current practices and make recommendations to improve engagement. The final deliverable for this project is a presentation outlining our analysis and recommendations that give NWCS D the information needed to design a plan to engage different aspects of the community using a range of tools and design a professional development plan to support the district in effectively implementing the engagement plan.

Previous Professional Experience

**ENCOURA, EDUVENTURES,
BOSTON, MA**
Quantitative Research Analyst
2021-2024

Evaluated programs at higher education institutions using institutional and national data to inform institutions on opportunities to expand and/or strengthen their academic portfolio. Enhanced the deliverable with competitive market and in-depth analysis and innovated processes by expanding tool utility to include new program identification and assessment of multiple degree levels. Worked closely with company's subject matter analysts to transform key data findings into clear graphics and communicated these findings in internal and external reports and data presentations.

**COLUMBIA UNIVERSITY,
 CENTER FOR PUBLIC
 RESEARCH & LEADERSHIP,
 NEW YORK, NY
 Project Associate
 2020-2023**

Researched the use and impact of high-quality instructional materials through desktop research, analyzing available data, and facilitating interviews and focus groups to create district case studies and a final report. Collaborated with several independent consultants on a grant-funded project for NYCDOE to develop tools to encourage a more strategic and critical approach to early literacy partnerships. Developed an audit, feedback tracker, and pilot plan to assess the effectiveness of, collect and organize feedback on, and test a suite of eleven literacy goal development and partner establishment tools for school use. Researched the impact of school scheduling on equitable access to learning and produced field-facing recommendations and resources to support schools and districts (sponsored by Bill and Melinda Gates Foundation).

**CENGAGE LEARNING,
 BOSTON, MA
 Product Assistant
 2017-2019**

Supported Product Management in building product proposals; work with PM to enter accurate product setup, royalties, schedule, budget, and sales. Assisted market development team by liaising with sales, creating target lists, recruiting reviewers and focus group participants, developing product review surveys in Qualtrics, and consolidating/analyzing instructor feedback. Pulled, collated, and analyzed data and reports from various systems.

**WORLDTEACH,
 RIOBAMBA, ECUADOR
 Global Education Fellow
 2016-2017**

Instructed English for 25 hours a week to grades 3 through 10 with class sizes of 48 students as part of the pilot cohort for the Time to Teach Initiative spearheaded by Ecuador’s Ministry of Education and local partner Edificar. Adapted national curriculum to meet student needs by creating age and English-level appropriate lessons. Utilized data to tailor lesson plans, inform and adjust classroom goals, and target underperforming students.

Education

Columbia University, Teachers College
 Master of Arts in Education Policy

Northwestern University
 Bachelor of Arts in Anthropology

Professional & Personal Skills

- **Proficient in SPSS, Stata, Q Research Software, Mplus, Excel, Alteryx, TEFL Certified, Adobe, and Qualtrics**
- **Data Analysis**
- **Proposal & Report Writing**

MAXWELL C. MACORT *Business Analyst*
 Public Consulting Group LLC

Relevant Project Experience

STATEWIDE EQUALIZATION FORMULA ASSESSMENT

Delaware Department of Education

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LANDSCAPE ANALYSIS REGARDING BEHAVIOR IN UTAH SCHOOLS

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PCG worked with the Utah State Board of Education (USBE) to conduct a landscape analysis of the behavior management systems and policies in Utah schools. PCG identified relevant strengths, weaknesses, opportunities, and threats to the way that Utah schools and community partners currently handle student behaviors, as well providing recommendations as to how the state can better support districts.

STUDENT SUPPORT SERVICES AUDIT & CONSULTING SERVICES

Norfolk Public Schools, VA

PCG conducted a comprehensive analysis of Norfolk Public Schools’ (NPS) Department of Student Supports Services current practices and developing a complete plan to identify the strengths and areas for improvement. PCG provided a systematic assessment of internal controls and risk management processes, resulting in recommendations.

Previous Professional Experience

**ANNENBERG INSTITUTE FOR
 EDUCATION REFORM,
 PROVIDENCE, RI**
*Policy in Action Project
 2024*

Devised targeted recommendations to Providence Public Schools related to recruiting and retaining diverse educators. Provided memos and reports that highlighted data gathered through quantitative analysis of district data as well as data gathered and cleaned from interviews and focus groups of prospective teachers and education preparation providers.

*Research Assistant
 2023-2024*

Worked on Principal Equity Pipeline Project, providing qualitative coding of interviews and meeting transcripts with the research team and district partners using MaxQDA.

**NATIONAL LEAGUE OF CITIES,
 REMOTE**

*Tax Data Science Intern
 2023-2024*

Conducted quantitative and qualitative data analysis on large public use datasets, including cleaning, processing, and visualizing data related to Earned Income Tax Credit (EITC) uptake. Helped to create a dashboard to support local leaders in identifying best areas for targeted outreach to increase EITC uptake.

**MASSACHUSETTS SERVICE
 ALLIANCE, BOSTON, MA**

*Commonwealth Corps
 Program Fellow
 2022-2023*

Designed and led professional development curriculum for Commonwealth Corps members, including trainings on topics such as resume writing, interviewing, and salary negotiation. Supported host site selection process by leading community grant review process and reviewing proposals. Provided administrative support by meeting bimonthly with service

members, reviewing timesheets, coordinating and planning trainings and identifying professional development opportunities for members.

REGIONAL ENVIRONMENTAL COUNCIL, WORCESTER, MA
Youth Volunteer Engagement Specialist
2021-2022

Completed a Commonwealth Corps service internship, providing over 750 hours of service to assigned host site agency, the Regional Environmental Council. Led various youth programming, including college readiness training and professional development, and led farm work sessions. Participated in the planning of the Massachusetts Youth Justice Rally and helped prepare YouthGROWers to co-lead the event in conjunction with other Massachusetts youth organizations. Served on planning committee for Annual Earth Day cleanup and Plant Sale.

FOREST FOUNDATION, BOSTON, MA
Forest Foundation Fellow
2021-2022

Competitively selected to be a first-year fellow to complete a funded internship at the Regional Environmental Council. Worked with a team of three interns to write a general operating grant for Project Citizenship that was funded for \$5,000. Selected to return for a second summer as a youth mentor at the Regional Environmental Council and mentored a team of undergraduates in successfully writing a grant for a local nonprofit.

Education

Brown University, Waston Institute for International & Public Affairs
Master of Public Affairs

Clark University
Bachelor of Arts in Sociology
Summa Cum Laude

Professional & Personal Skills

- Proficient in Salesforce, Stata, MaxQBA, & R
- Data Analysis
- Proposal & Report Writing

Work Samples

Included are links to two 5-year strategic plans that PCG developed with North Wasco County School District and the Lastinger Center, respectively.

North Wasco County School District: <https://www.nwasco.k12.or.us/apps/pages/strategicplan>

Lastinger Center: <https://lastinger.center.ufl.edu/about/strategic-plan-2022-2025/>



3040 E. Cornwallis Road • PO Box 12194 • Research Triangle Park, NC 27709-2194 • USA
Telephone +1.919.541.6000 • Fax +1.919.541.5985 • www.rti.org

February 5, 2025

MONIQUE CORLEY
Office of Procurement
The Mississippi Department of Education
359 North West Street
Jackson, MS 39201

Reference: Proposal for Services, *Strategic Planning and Performance Scorecard, RFP*
3020003047

Dear Ms. Corley:

Research Triangle Institute, under the trade name RTI International (RTI), a 501(c)(3) nonprofit corporation, is pleased to submit this proposal in support of the Mississippi Department of Education. RTI proposes to perform the support services for a price of \$339,862 over a period of performance of twelve (12) months, beginning on or about April 1, 2025 through March 31, 2026. In support of this offer, RTI is providing the attached proposed statement of work and payment information.

If this proposal were selected for award, RTI would be pleased to have the effort authorized under a fixed price contract with mutually agreeable terms and conditions. RTI payment terms are NET 30 upon receipt of an RTI invoice. Please let me know if you have any questions or concerns.

This proposal shall remain firm until April 1, 2025.

RTI appreciates the opportunity to submit this proposal for your consideration, and we look forward to working with you on this project. Please feel free to contact me with any questions at evvandevender@rti.org or 919-316-3431.

Sincerely,

A handwritten signature in black ink, appearing to read 'Eve Van Devender', written over a horizontal line.

Eve Van Devender
Senior Contracting Officer

[0282500.474]

Appendix A – Proposal Cover Sheet

Company/Name: Research Triangle Institute

Proposals must be submitted as directed in the *Proposal Submission Requirements* on or before the submission deadline specified in the solicitation.

Company Representative and Title	Eve Van Devender, Sr. Contracting Officer
Mailing Address	PO Box 12194, 3040 East Cornwallis Rd
City, State, Zip	Research Triangle Park, NC 27709
Telephone:	919-316-3431
E-Mail Address:	evevandevender@rti.org

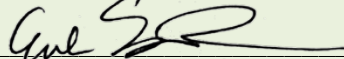
Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? 3102134481
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: 1/27/2025



State Board of Education Strategic Planning and Scorecard Development

Volume 1—Technical Proposal

Response to Request for Proposal (RFP)

February 5, 2025

Submitted By

RTI International
3040 East Cornwallis Road, PO Box 12194
Research Triangle Park, NC 27709-2194 USA
www.rti.org

RTI Proposal No. 0282500.474
RFX No. 3120003047

Submitted To

The Mississippi Department of Education

Attn. Monique Corley
Office of Procurement
359 North West Street
Jackson, Mississippi 39201

RTI Administrative Point of Contact

Eve Van Devender
Office of Contracts

Phone: 919-316-3431
Email: evevandevender@rti.org

This proposal shall be used for evaluation purposes only. Per Mississippi Code Annotated §25-61-9(7), the Mississippi Public Records Act, and the Mississippi Uniform Trade Secrets Act, RTI has provided a redacted copy of its proposal protecting certain information as proprietary and business confidential. The information on marked pages is considered exempt from disclosure. Should RTI be awarded a contract as a result of this proposal, the client may have the right to use and disclose the redacted copy of RTI's proposal.



Vendor's Proposal

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*RTI International is a trade name of Research Triangle Institute.
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Component 1: Plan of Action

The Mississippi Department of Education (MDE) is embarking on the development of the state's next strategic plan through a process that will be supported and informed by key stakeholders. MDE seeks a partner that will develop a comprehensive strategic plan, including goals, priorities and measurable objectives for the MS State Board of Education (SBE). [REDACTED]

Mississippi has made remarkable progress over the past 5 years, leading the nation in the focused implementation of evidence-based practices of the science of reading, which have resulted in significant improvements in student outcomes. From this position of strength, [REDACTED]

[REDACTED] The United States stands at an important juncture, and the ability of our public education systems to rise to the challenge will be a vital component of state and national economic success. [REDACTED]

In response to MDE's Request for Proposal (RFP), RTI has crafted a customized plan for our approach to this work. Our proposed project team, chosen specifically for the unique needs of this project, [REDACTED]

To meet MDE's needs, RTI will blend our unique approaches to consulting, strategic planning, and change management into a customized plan of support, which is fully detailed in this section and in [Tab 1](#). Our approach to strategic planning is built on our team's practical experience [REDACTED]

[REDACTED] to think critically and creatively about the status quo and the future. To make such discussions actionable, we use systematic processes to organize these reflective activities, gather data, and use those data to drive the design of a strategic plan.

Although change management is distinct from strategic planning, we believe that effective strategic planning includes consideration of how to plan and communicate around transformation. [REDACTED]

From their professional experience, our team is aware of the complexity of strategic planning and change management across a state. In addition, we understand that finalizing a strategic plan marks the start of our journey, not the end. Our team has experience in developing detailed

implementation plans and in building progress monitoring and evaluation frameworks, to ensure the institutions we work with can do what they say they will do.

C1.1 Customized Approach for MDE

RTI proposes an approach to strategic planning for MDE that starts with getting the right people engaged in sharing their hopes and aspirations for the state (see [Section C1.2](#)), providing feedback along the way, and ultimately championing the strategic plan and the statewide efforts in the years to come. With the right people engaged, RTI proposes

RTI will approach our work with MDE as we do all clients: with a sense of purpose grounded in shared values, commitment to using data to drive practice, and foregrounding the things that make Mississippi a unique and special place in the world for students starting out on life's journey. Some of the unique contextual factors in the state (of which we will learn more through the process) include the following:

- **Building on Growth** – In the last 5 years, Mississippi has seen remarkable growth that shows the state can pursue and achieve widescale change. Some areas of particular growth that RTI would plan to build on include the efforts that led to the following outcomes:
 - NAEP 4th Grade Reading Ranking moving from 50th in the nation to 21st between 2013 and 2023.
 - State graduation rates moving from 75.5% in 2013 to 89.4% in 2023.
 - A decrease in dropout rates, moving from 13.9% in 2013 to 8.5% in 2023.¹
- **Expanded Focus on Career and Technical Education (CTE)** – Mississippi continues to prioritize CTE as a cornerstone of its educational and workforce development strategy. The state aims to align student skills with the demands of high-growth industries, ensuring that graduates are well prepared for the job market. AccelerateMS, a key driver in this effort, has introduced programs such as the Mississippi Apprenticeship Accelerator and EquipMS Equipment Grants to modernize facilities and expand access to career-specific training. Mississippi has attracted significant investments in technology infrastructure, including Amazon Web Services' (AWS) \$10-billion investment in Madison County for two data center complexes, expected to create more than 3,000 jobs. Similarly, Compass Datacenters has committed \$10 billion to a data center campus in Lauderdale County. These investments underscore the need for Mississippi's schools to prepare students for careers in high-tech fields. A key focus of RTI's work would ensure that the voices, needs, and input of Mississippi business and industry are heard and represented in the next state strategic plan.
- **Rurality and Population Decline** – Mississippi is experiencing a steady population decline, with a significant drop in its school-age population. Between 2020 and 2023, the state lost more than 21,000 residents. Rural districts face particular challenges in maintaining operational efficiency because of declining enrollment, affecting funding and

¹ Evans, L. (2025). *Strategic Plan Annual Progress Report 2023-24*. Mississippi State Board of Education. https://mdek12.org/wp-content/uploads/sites/29/2025/01/2023-24_Strategic-Plan-Annual-SBE-Progress-Report-combined.pdfw

resource allocation.² However, rural communities in Mississippi also have a wealth of assets, with tight-knit generational connections, strong civic and faith organizations, and dedication of school staff to their towns and communities. RTI has significant experience working in rural districts, particularly in North Carolina, which has the second-largest rural population in the country. RTI would approach our work while considering both how to address challenges associated with rural communities and how to build on those communities' unique strengths.

The Delta region of Mississippi has long been a cultural touchstone in the state's history, with its unique contribution to America's musical traditions and deep history. Additionally, the Delta continues to face significant economic and educational challenges associated with poverty. Our work will recognize and plan for the unique needs of this community, focusing on business and industry connections, on teacher recruitment and retention, and on addressing challenges of chronic absenteeism.

- **School Choice** – The Mississippi Legislature is advancing school choice initiatives, including proposals for universal education savings accounts to allow public funds to be used for private school tuition or other educational expenses. These policies have sparked debate over their impact on public school funding. RTI will work with MDE staff and stakeholders to fashion a plan focused on helping the SBE strengthen all educational opportunities across the state, with a focus on public schools where the vast majority of students are currently educated.
- **Mississippi Student Funding Formula (MSFF)** – The MSFF was established through House Bill 4130 during the 2024 Regular Legislative Session. The MSFF replaces the previous Mississippi Adequate Education Program (MAEP) and introduces a weighted student funding formula. This new formula allocates funding based on net enrollment and a base student amount, with additional weights for specific student categories, including low-income students, English language learners, special education students, gifted students, and those enrolled in CTE programs. This new formula represents an opportunity to address long-standing challenges across the state with new resources based on need. However, as with all budgetary changes, we anticipate some complications in the implementation.
- **New Accountability Plan** – MDE is revising its Public School Accountability Standards, with updates planned for full implementation in 2026. The revised framework emphasizes growth measures, graduation rates, and college and career readiness, alongside traditional metrics like standardized test scores. This holistic model is designed to provide a clearer picture of student success and areas for improvement. RTI will partner with MDE to ensure tight alignment between the outcome measures in the district and school accountability plan, and those measures for which the state will hold itself accountable.

C1.1.1 Strategic Plan Development Process

Both research and experience inform RTI's methodology for developing the MDE strategic plan. Strategic plans enable organizations to

1. prioritize goals important to their mission and aligned with their community's aspirations,
2. focus on vital actions to achieve those priorities, and
3. allocate and align resources.

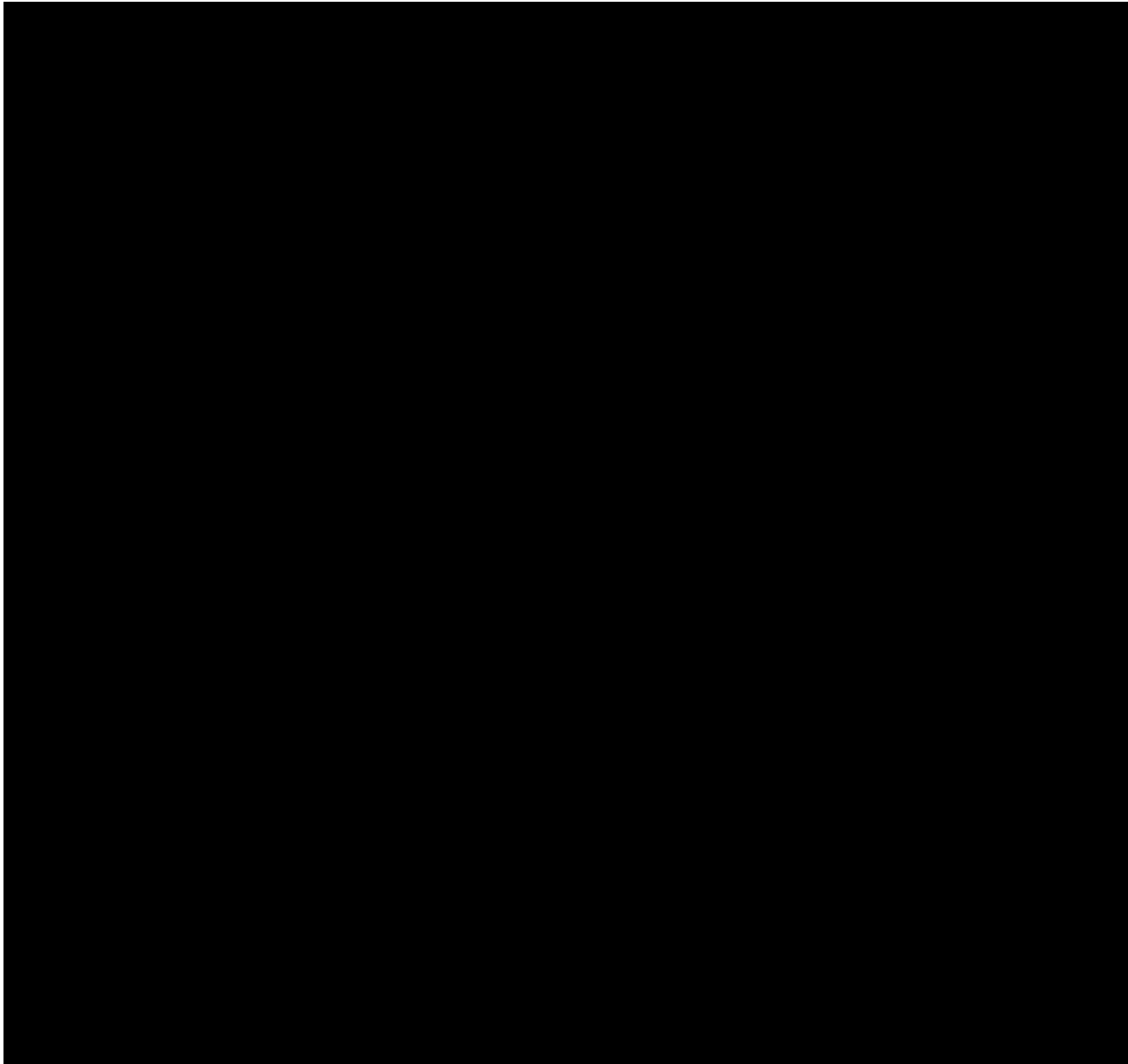
² Pittari, J. (2024, February 2). Population decline concerns Mississippi universities. *Magnolia Tribune*. <https://magnoliatribune.com/2024/02/02/population-decline-concerns-mississippi-universities/>

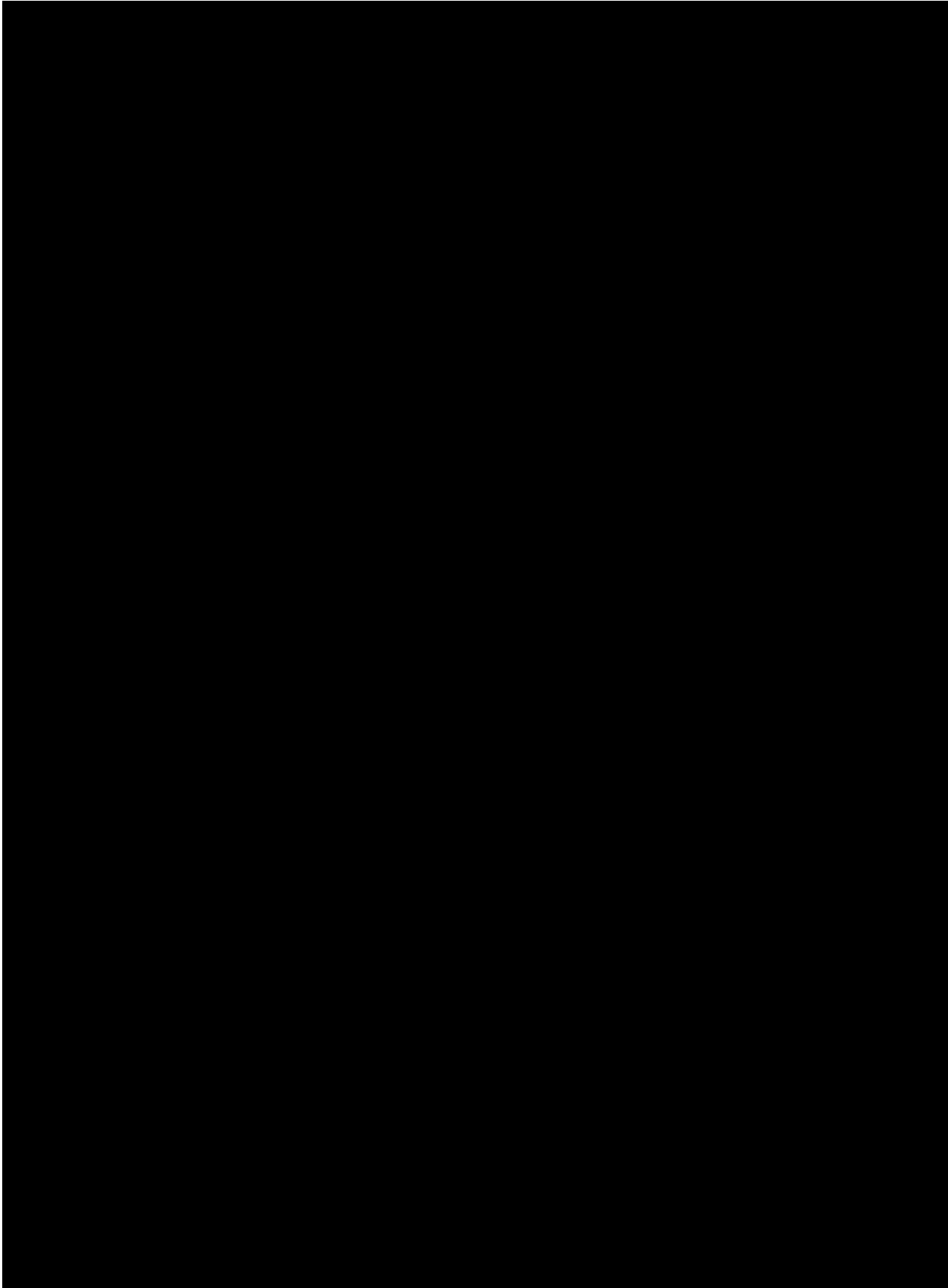
Breazeale, G. (2023, March 2). The devastating consequences of declining school enrollment. *Mississippi First*. <https://mississippifirst.org/blog/declining-school-enrollment>

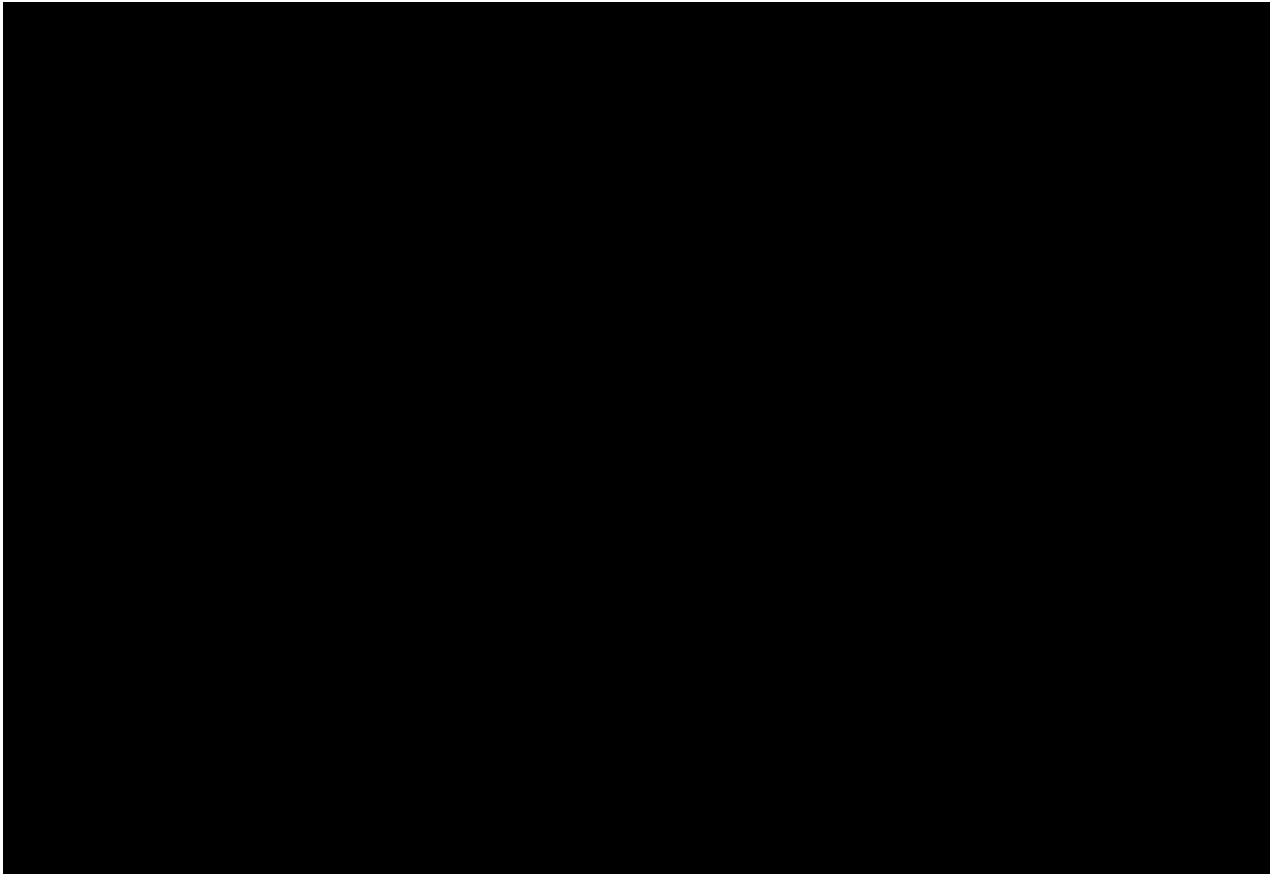
[REDACTED]

We will collaborate with MDE leadership to ensure that the approaches below meet state and stakeholder needs and that we involve the right people in the process (see [Section C1.2](#)).

Exhibit 1. Process for Developing and Implementing MDE’s Strategic Plan

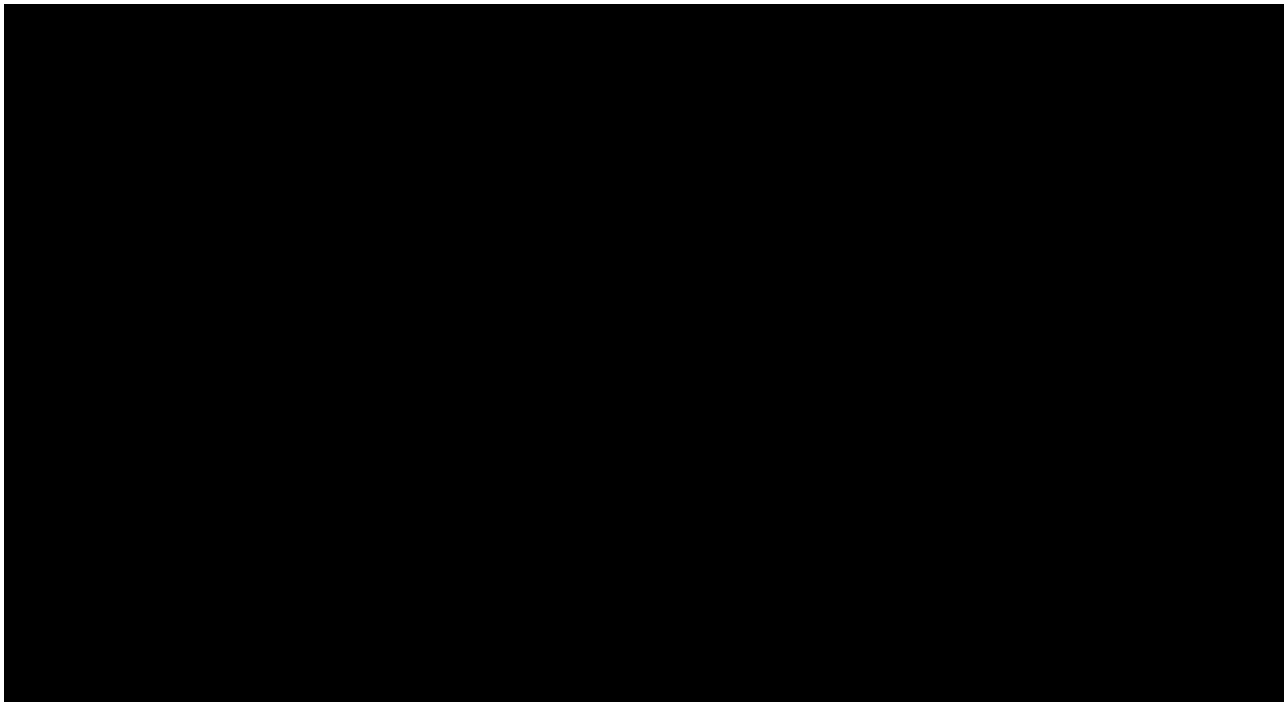


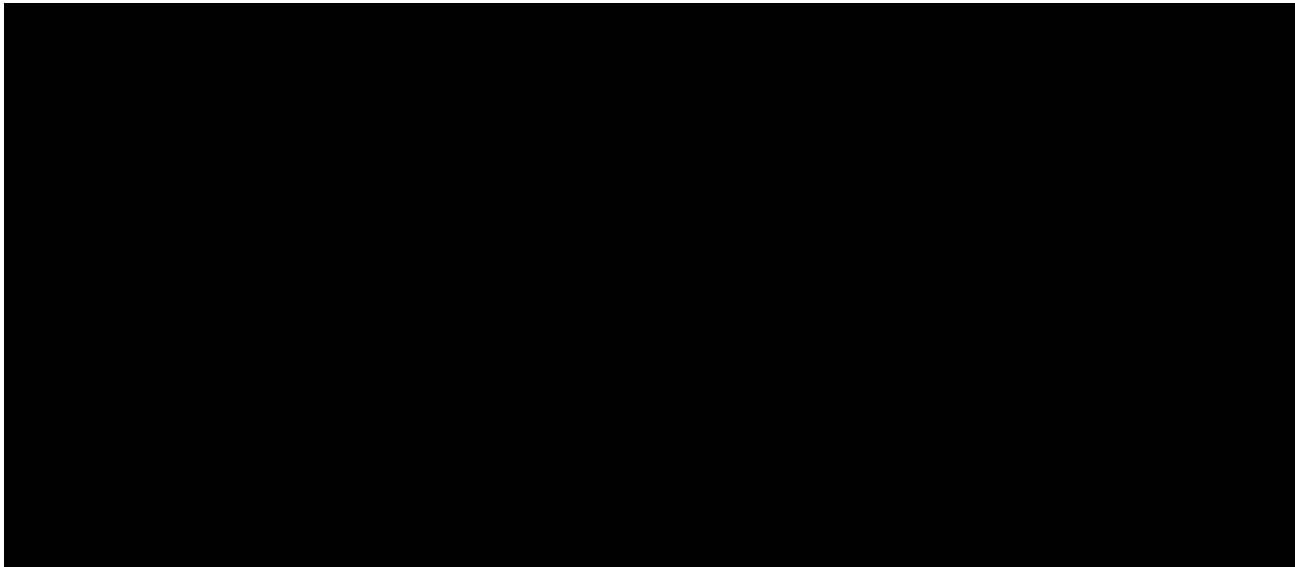




C1.1.2 Principles to Guide the Process

The process above will be guided by the following principles:





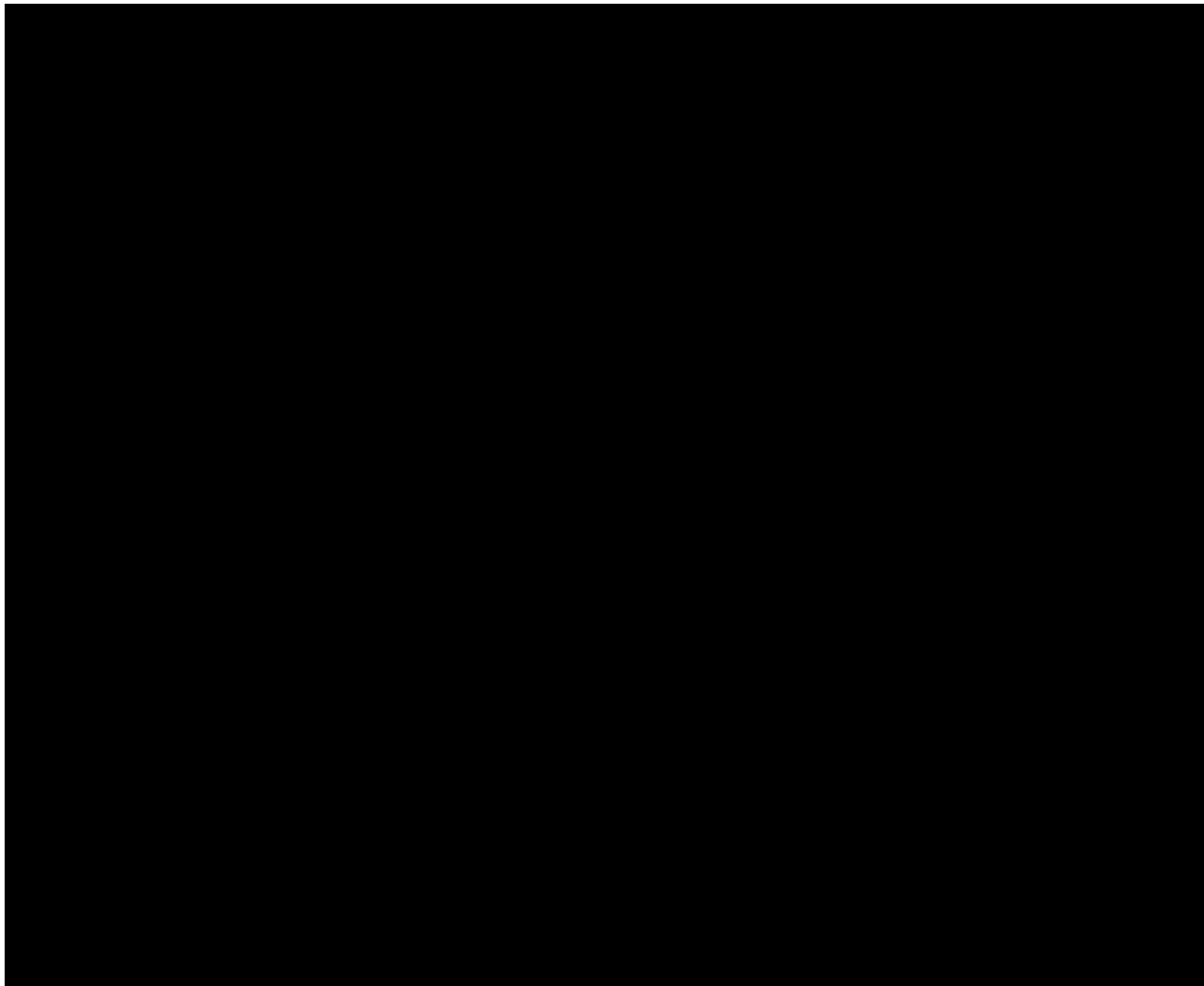
C1.2 Seeking Input and Stakeholder Engagement Framework

Planning educational priorities and strategies is ultimately about setting up the conditions to influence and change people. On the most fundamental level, that means changing students for the better as embodied in the MDE’s vision—to create a world-class educational system that gives students the knowledge and skills to be successful in college and the workforce, and to flourish as parents and citizens. To do this, state organizations need leaders, staff, and the local districts to inspire and enable this change in students. People will make the change; therefore, all stakeholders need to participate in planning.

RTI centers community input in all our planning work, with a focus first and foremost on students and outcomes. We have employed myriad different ways of involving the community, from one-on-one interviews, to focus groups, to small kitchen-table conversations, to larger Town Halls. Additionally, we gather feedback through surveys, targeted questionnaires, analyzing existing data (from staff, community, and/or student surveys), and asking for feedback on draft plans. We seek to use multiple means of gathering feedback to make sure that all have access and opportunity for input. The convenience of virtual meetings offers the ability to brainstorm and talk in small groups across the state, which can be compelling and convenient for some stakeholders and can allow us to cast a statewide net; whereas others will engage most actively in in-person discussions using chart paper and sticky notes. We seek to take advantage of all these methods of gathering input.

We understand that people are passionate about education and the ripple effect this has into the community. As a result, we are adept at navigating heartfelt conversations and leveraging empathy and compassion to understand where our stakeholders are coming from. RTI facilitators are trained in dealing with key issues and sensitivity through Facilitative Leadership® and Critical Friends Group® strategies and protocols.





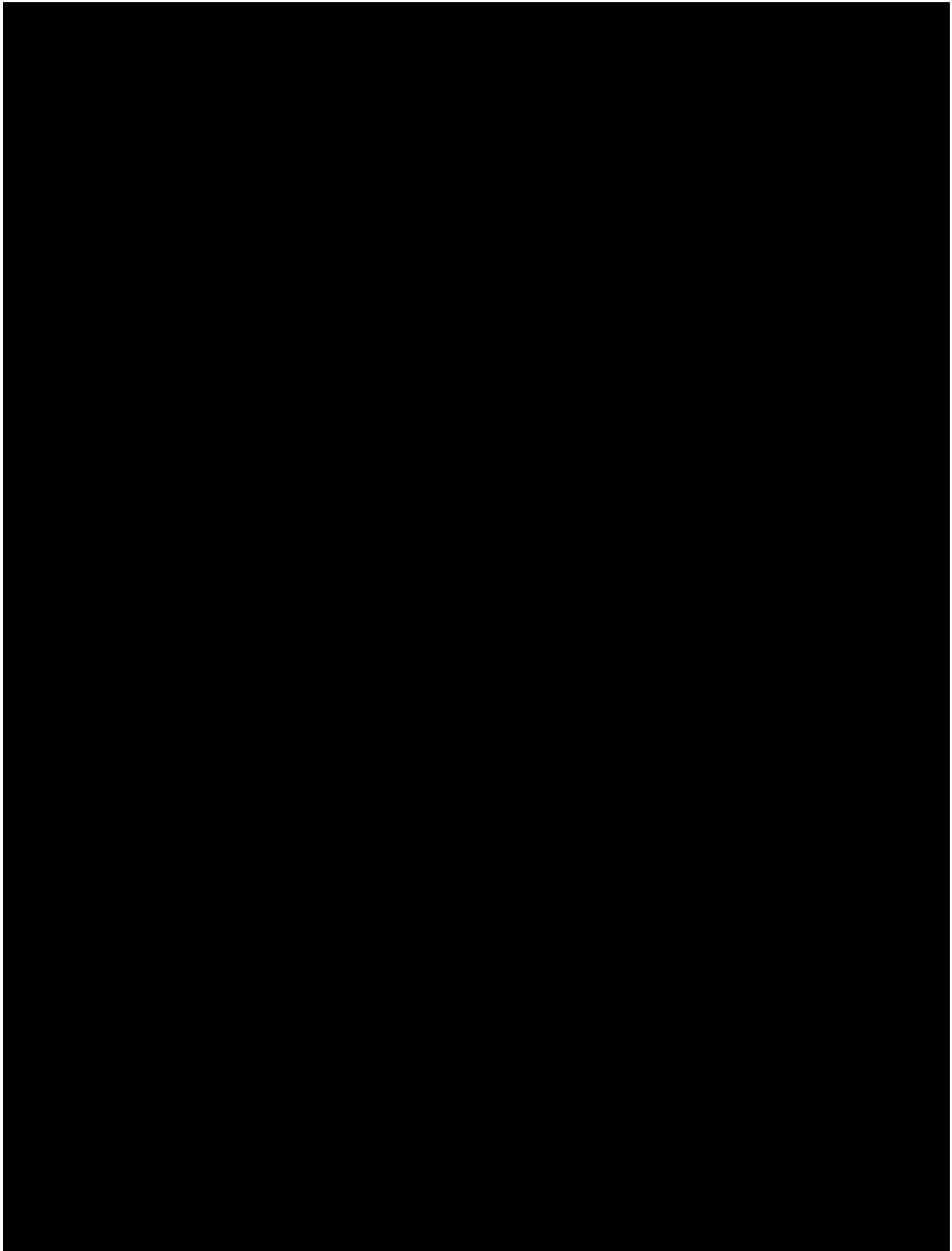
Tab 1: Production/Detailed Service Plan

We believe a clear strategic plan is important for improving institutional outcomes. RTI's strategic planning support focuses on student success by prioritizing what is most important for the state, setting clear goals and measures across departments, and aligning strategies and objectives to achieve those goals.

T1.1 Project Timeline

RTI will collaborate with MDE leadership to ensure that the time frames and approaches below meet the state's expectations and the needs of each State Division. We lay out what we believe will be an accomplishable timeline (**Exhibit 3**), with the assumption that we will modify within the first 15 days when creating a work plan in collaboration with MDE staff. In all our engagements, we commit to remain true to the needed final deliverable date and will work with the client to adjust as needed along the way to ensure that goal is met.

Exhibit 3. Draft Timeline

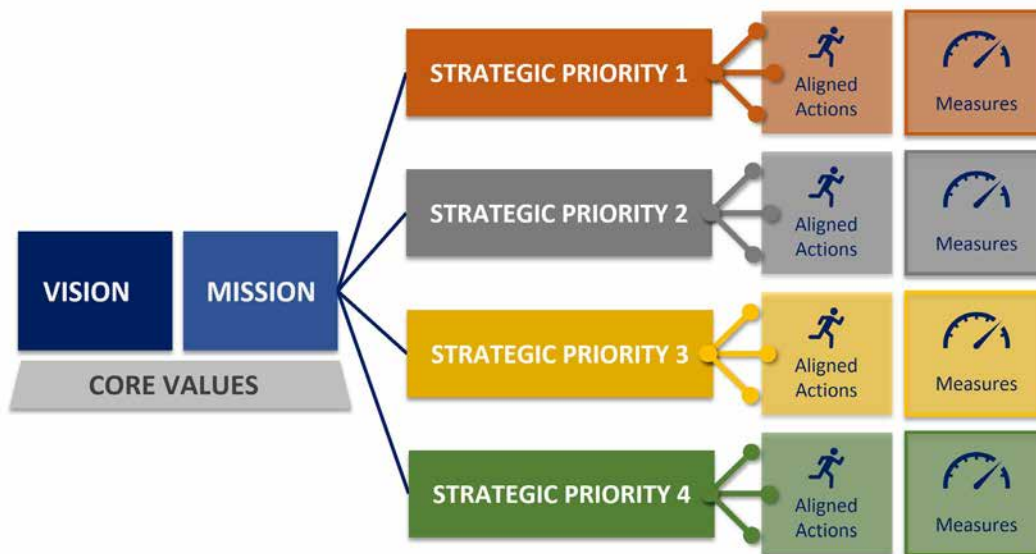


T1.2 The Process – Measurable Goals and Objectives and Implementation Plans

Developing and documenting goals and objectives that are actionable and measurable and formulating implementation plans are vital components of any strategic plan development process. The goals and objectives make measurable **what** MDE is setting out to accomplish, and the strategies and action plans describe **how** MDE will accomplish those goals.

RTI will use the framework in **Exhibit 4** to organize the plan components.

Exhibit 4. Organization of Plan Components



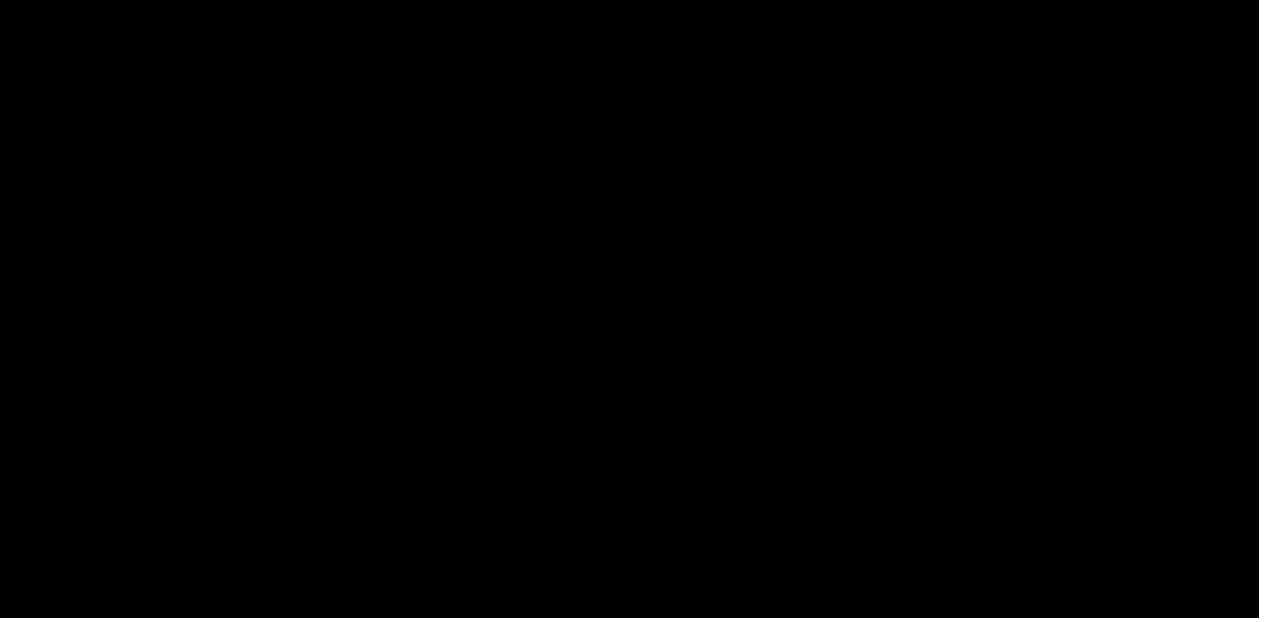
T1.2.1 Goals and Objectives

As outlined, RTI starts with a data-based understanding of the institution to establish a baseline for the measures that matter. We will collaborate with MDE staff to compile a current picture of the state using key available documents, data, and institutional metrics, including (but not limited to) the following:

- Student outcomes (e.g., enrollment, persistence and graduation, dropout rate, ACT benchmarks, dual-credit enrollment, student performance and proficiency)
- School/district outcomes (e.g., district/school report cards, teacher vacancies, fully licensed teachers)
- Institutional outcomes (e.g., financial health, data and systems health, educator preparation, recruitment and training)

We anticipate collaborating with MDE staff to secure and organize these baseline data. RTI will use these data, along with the SWOT analysis and the results from the environmental scan, to begin to formulate goals and key performance measures for the new strategic plan.

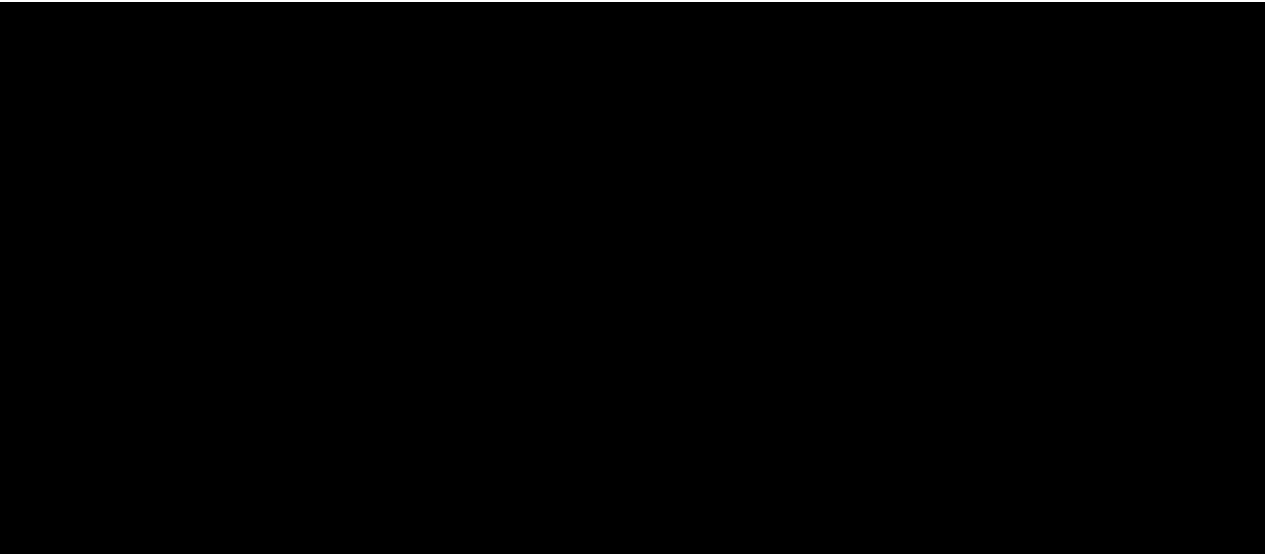
When setting goals and measures, RTI considers a few key attributes uses for selecting and using the measures:

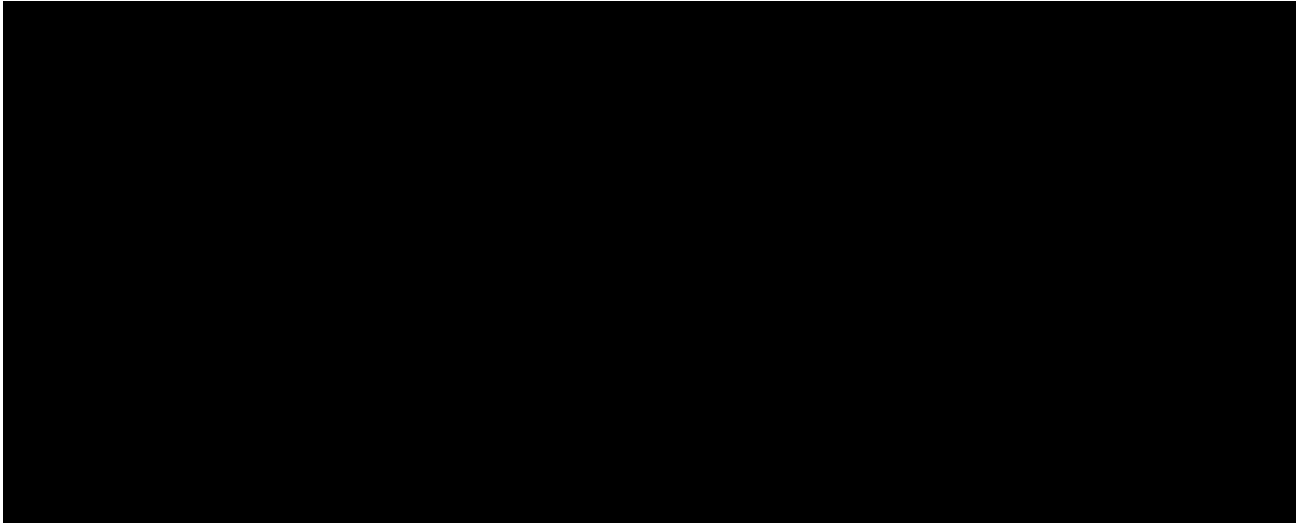


As we develop drafts of the strategic plan, we will encourage focus group participants and steering committee members to articulate their hopes and aspirations for the state in Stage I, and then select and vet measures for the performance scorecard in Stages II and III. We do this to ensure that participants are not limited to what is currently measured, but instead are able to describe qualitatively what they envision for the state. RTI will then help translate that into quantitative measures. Through this process, we often discover outcomes that the institution does not systemically collect that are important for the new strategic plan, and we revisit outcomes currently measured that no longer serve to inform the goals; establishing those new collections is vital moving forward.

T1.2.2 Implementation Planning

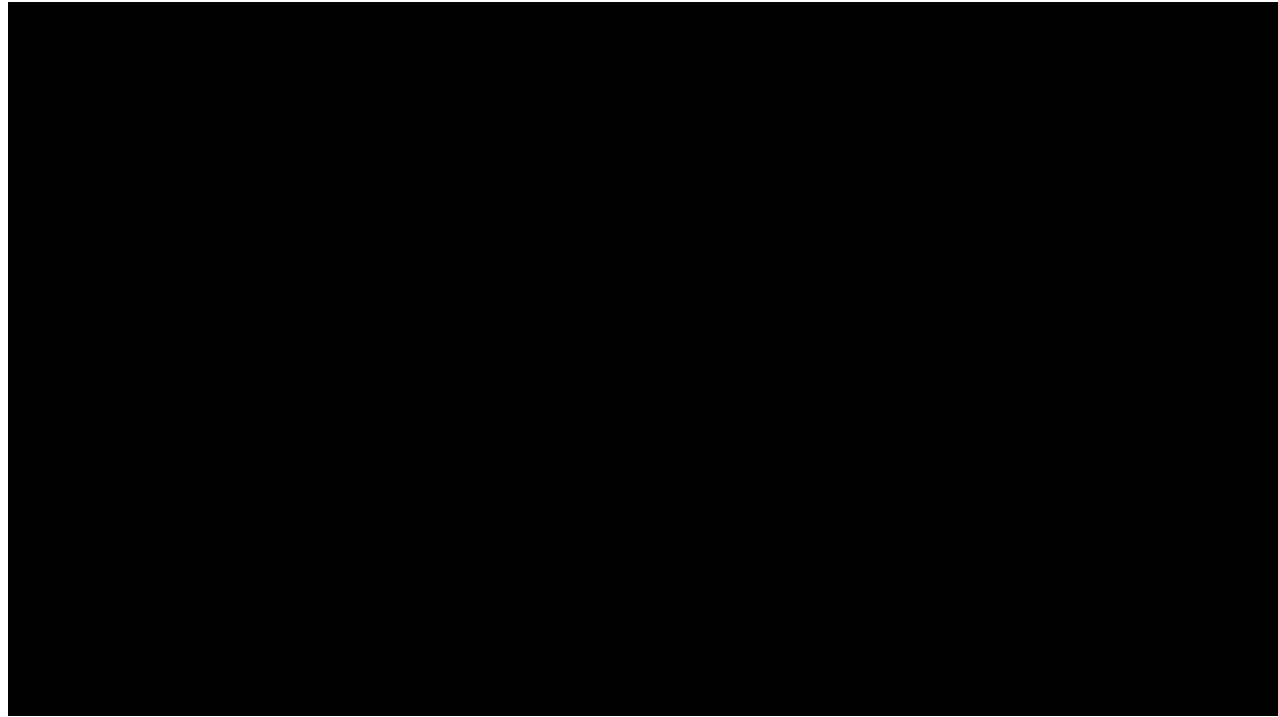
Typically, the final part of the strategic plan is developing and tuning the actions that will be taken to achieve the big goals of the plan. We approach the implementation planning process with some key considerations in mind:





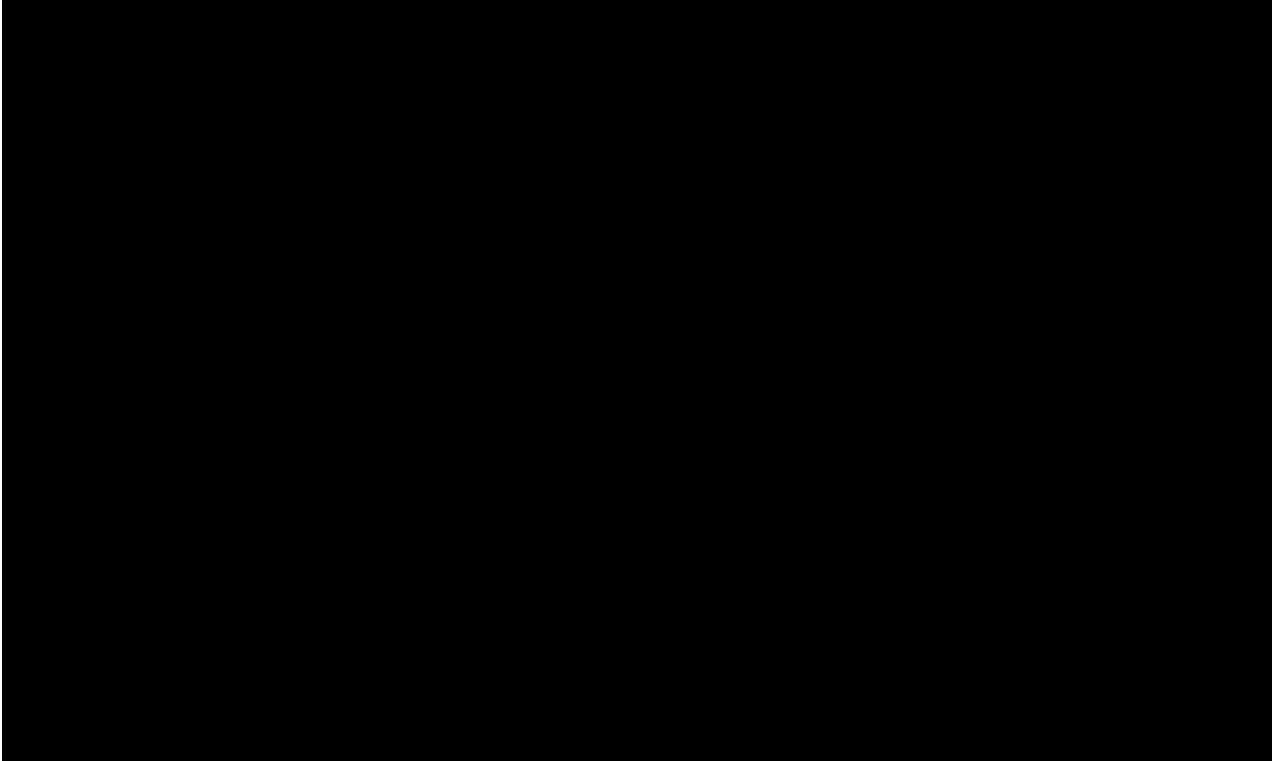
To support institutions in turning their strategies into actions, we often develop trackers as part of staging for implementation that allow divisions, units, and individuals to develop tactical plans. These trackers are typically built as shared spreadsheets, with all the priorities and actions arrayed in a sheet with expandable sections to allow for task planning, assigning responsible and accountable parties, and setting deadlines. **Exhibit 5** presents an example page of such an action tracker.

Exhibit 5. Sample Implementation Plan for Post-Adoption

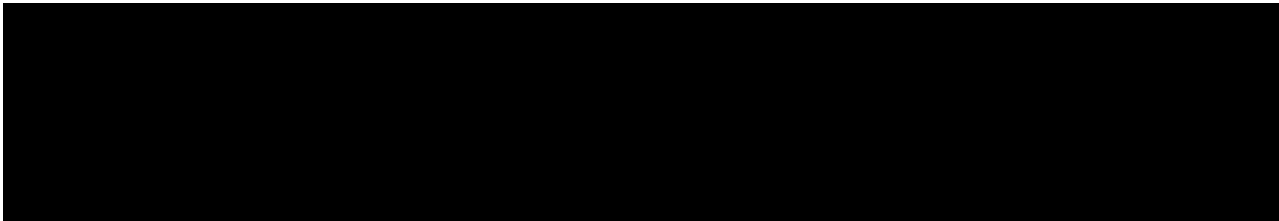


T1.2.3 Scorecard Development and Monitoring

Progress monitoring and evaluating the success of the strategic plan is a critical component in our work. We approach this component with the following considerations in mind:



MDE may want to consider integrating a **data dashboard** into their performance scorecard. Data dashboards consolidate information from various sources into a single easy-to-read interface, allowing users to monitor trends, track progress, and make informed decisions quickly.



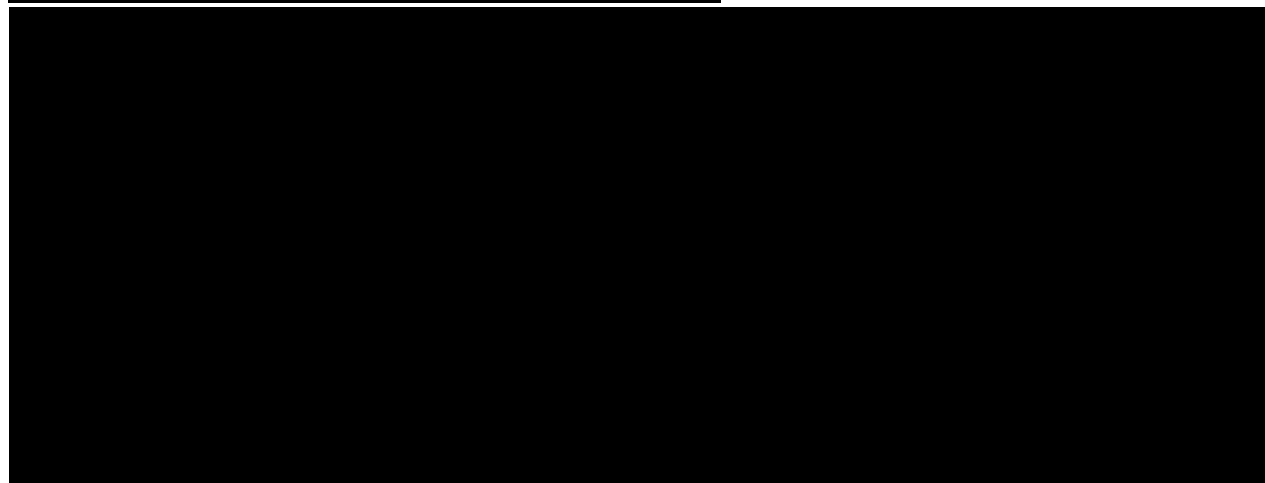
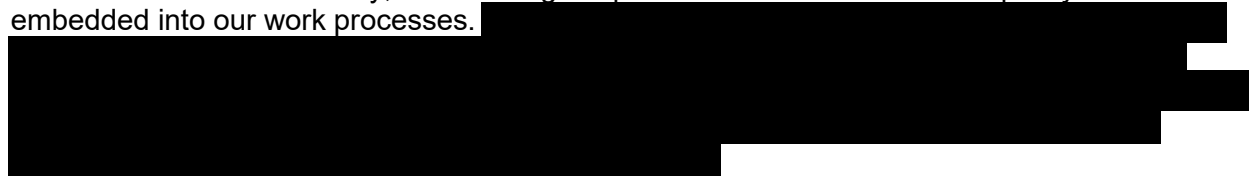
T1.3 Exceeding Minimum Qualifications

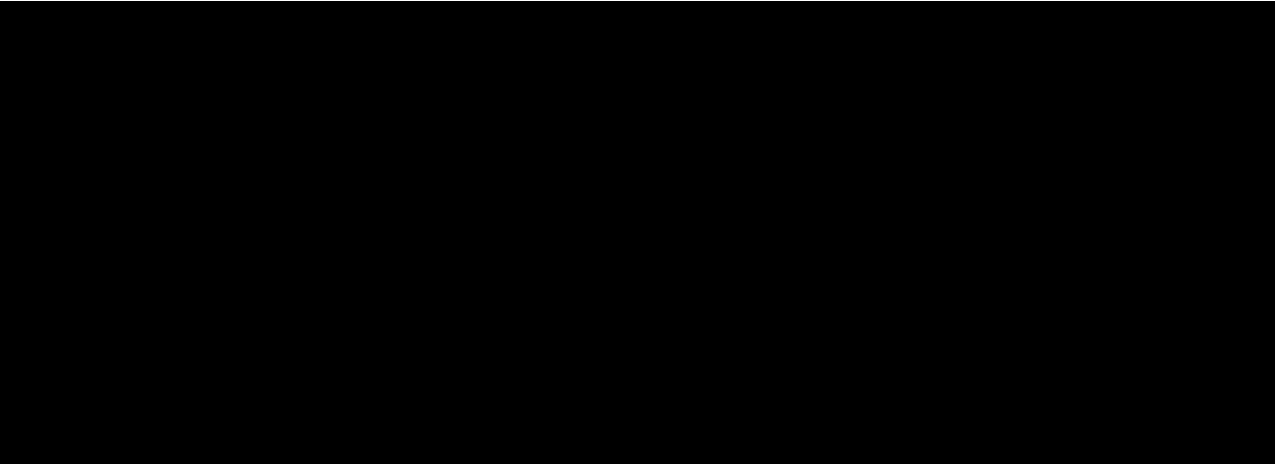
RTI is an independent, 501(c)(3) certified, nonprofit applied research and international development institute dedicated to improving the human condition. Founded in 1958, RTI implements innovative approaches and achieves results grounded in cutting-edge analytics and adaptive learning. With nearly 6,000 staff worldwide, we partner with a wide range of organizations across sectors to address some of the world's most complex challenges. Our status as an independent, not-for-profit research organization enables us to operate from a foundation of professional excellence, uncompromising ethical standards, and fiscal integrity. RTI is in good standing with Mississippi Code, Annotated § 79-4-15.01, regarding authorization to transact business in Mississippi.

RTI is led by an accomplished group of [senior executives](#) who represent a cross-section of our research fields and business operations. These leaders implement our business strategy and oversee operations for our global enterprise.

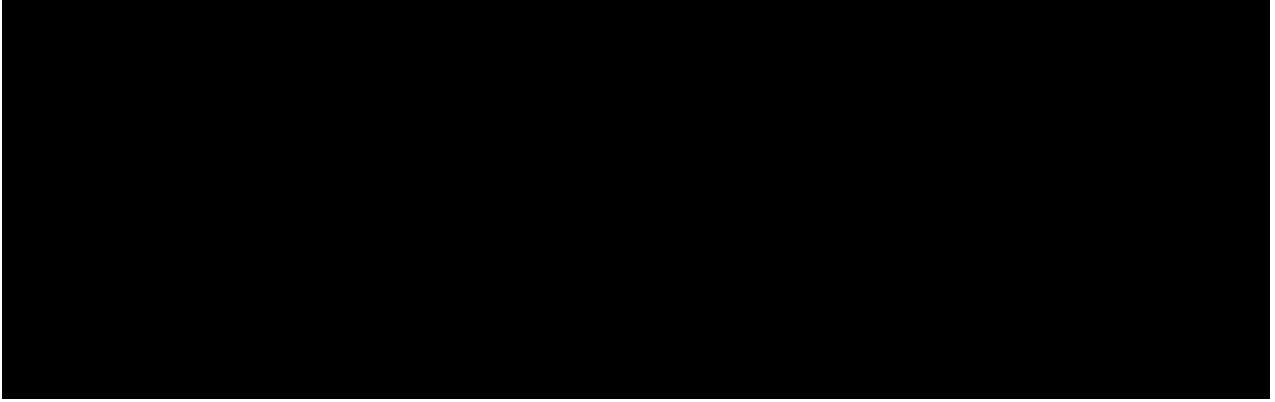
At RTI, we empower educators to design, plan, and implement action steps to better address challenges. From the classroom to the boardroom, our work focuses on partnering with educators to promote thriving learning environments that facilitate success for all students.

RTI's team is poised to provide the highest level of service to the staff and leadership of MDE to navigate the complexities and challenges that can arise during strategic planning. Collective experience tells us that most challenges can be mitigated from the outset by clearly defining quality service and understandings of quality deliverables with MDE leadership. Through open communication and flexibility, RTI sets high expectations and standards for quality which are embedded into our work processes.





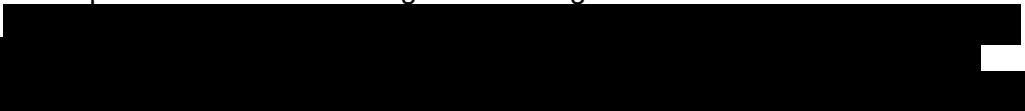
In addition to the quality management plan, RTI's team will engage in discussions about quality both explicitly and implicitly in all interactions with MDE leadership, partners, and collaborators. These will include the following strategies:



Ultimately, our customer service in delivering this plan will be executed through regular communication continuously informed through the systematic interactions and cadence of meetings with our state contact, MDE leadership, faculty, staff, students, and community members.


Component 2: Administration

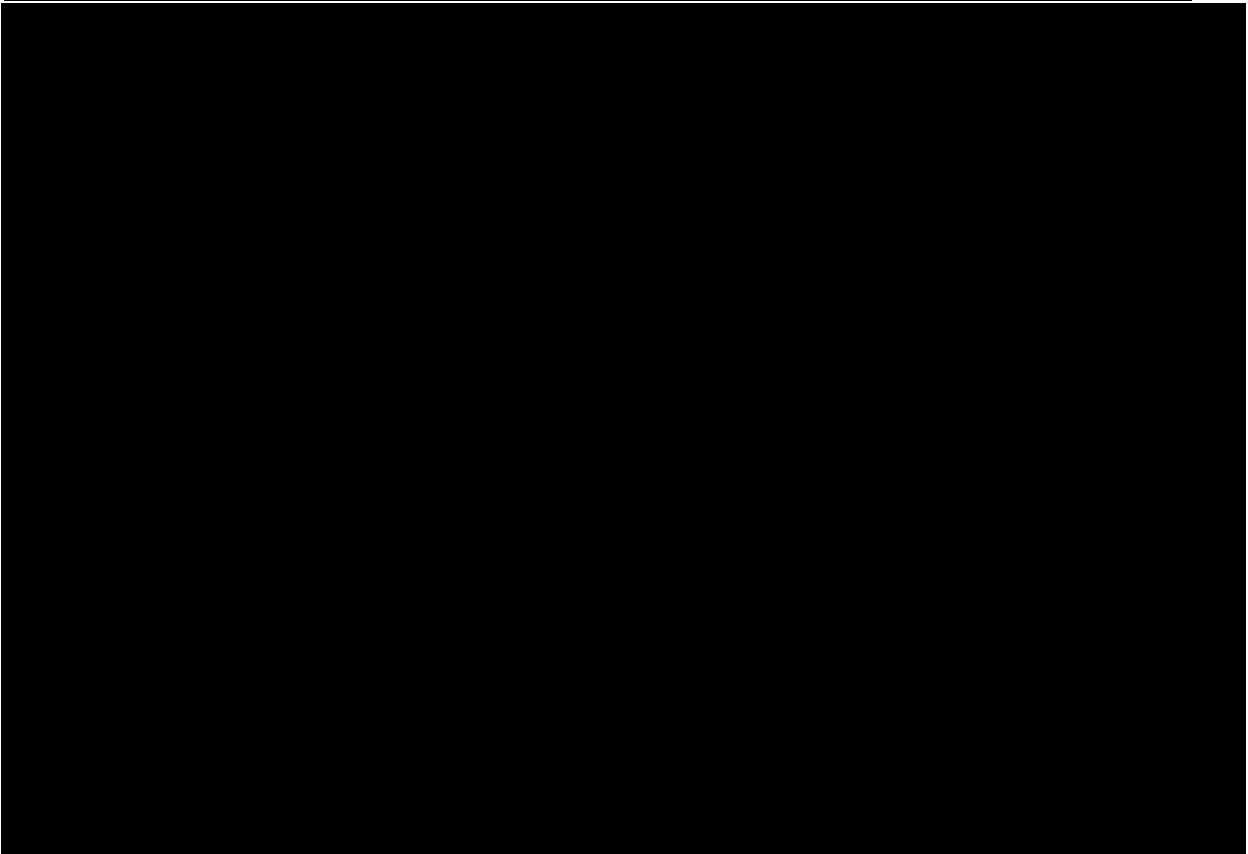
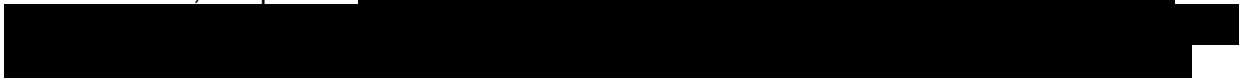
RTI brings a team composed specifically for this project and tailored to the unique context of MDE. RTI is equipped to develop a compelling and actionable strategic plan that will be able to measure progress toward the most strategic impact on the districts, schools, and students served by MDE. RTI will deliver this plan with the highest standards of quality and customer service, ensuring that MDE has a strategic plan that expands and opens wider a future of success for students, the state, and the community.

Our proposed team understands the complexity inherent in strategic planning and change management at the scale of supporting a state with evolving educational landscapes and shifting priorities. RTI brings a team with extensive experience in strategic, implementation, and monitoring plan development and K-12 teaching and learning. Our team of leaders for this project includes 



C2.1 Proposed Project Team Roles and Responsibilities

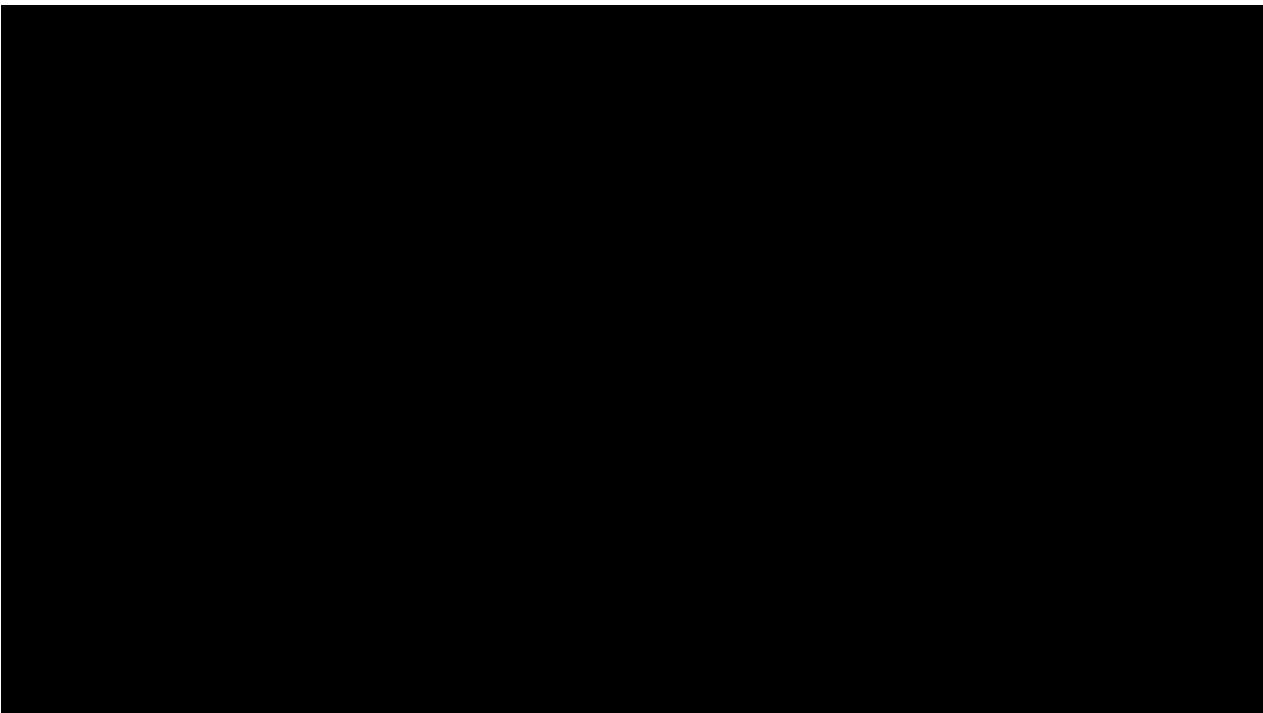
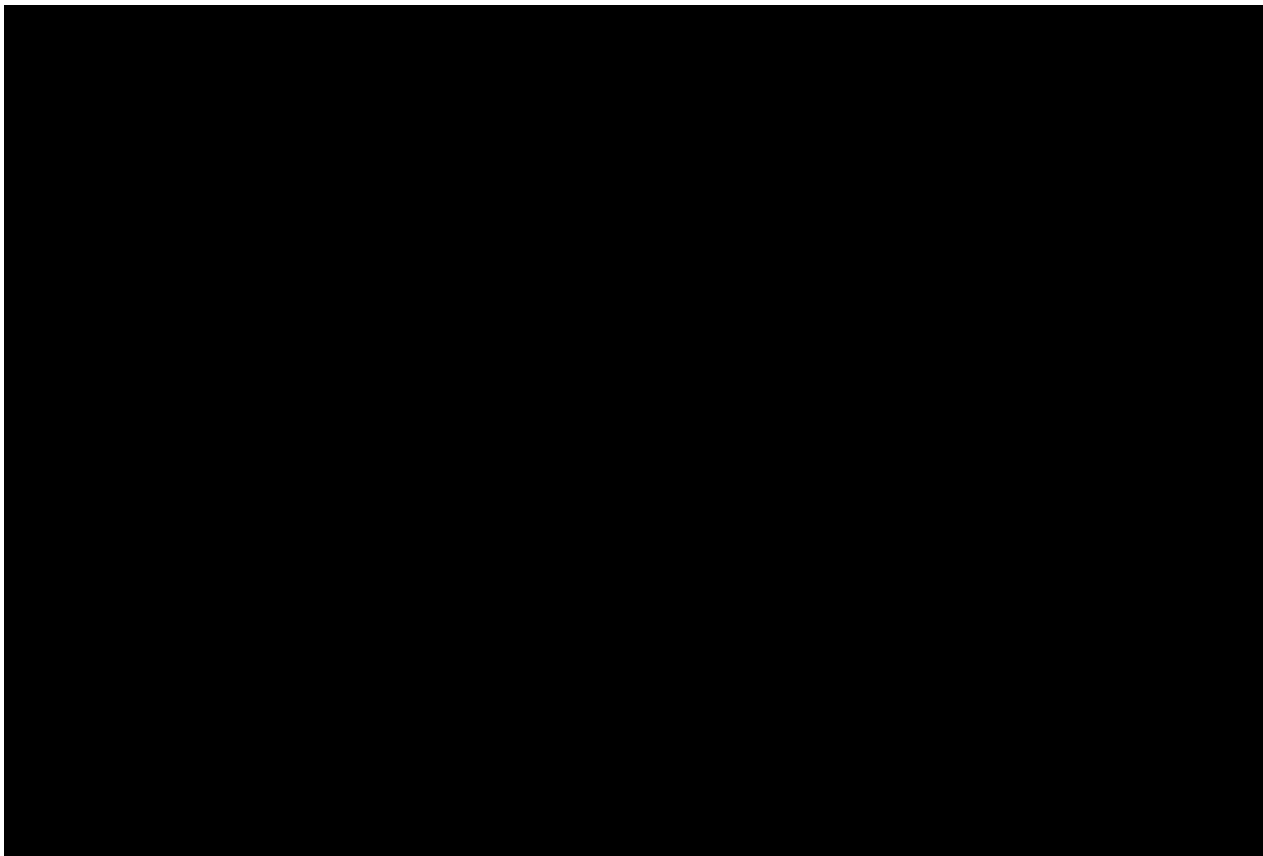
For this collaboration with MDE, RTI proposes a project team with extensive experience supporting educational institutions in gathering stakeholder input, facilitating work sessions with state leaders, gathering extant data that provide meaningful insights, developing impactful strategic plans that drive improved outcomes, and designing change management strategies—including communications—needed to implement a plan fully. Each proposed staff member brings relevant individual expertise, and the collective project team provides a balanced combination of implementation, academic, management, and technical skill sets. Alongside our core RTI team, our partner 

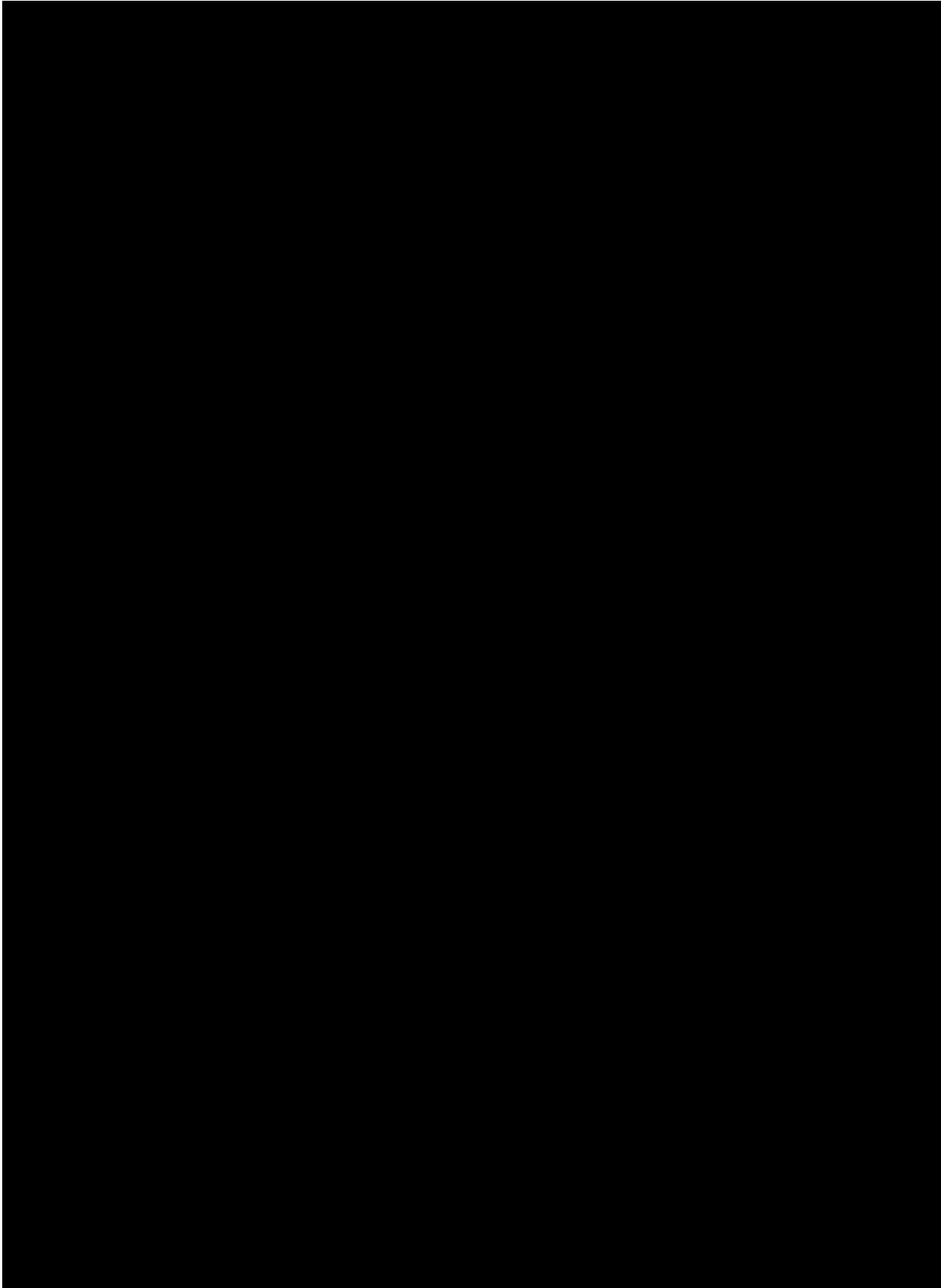


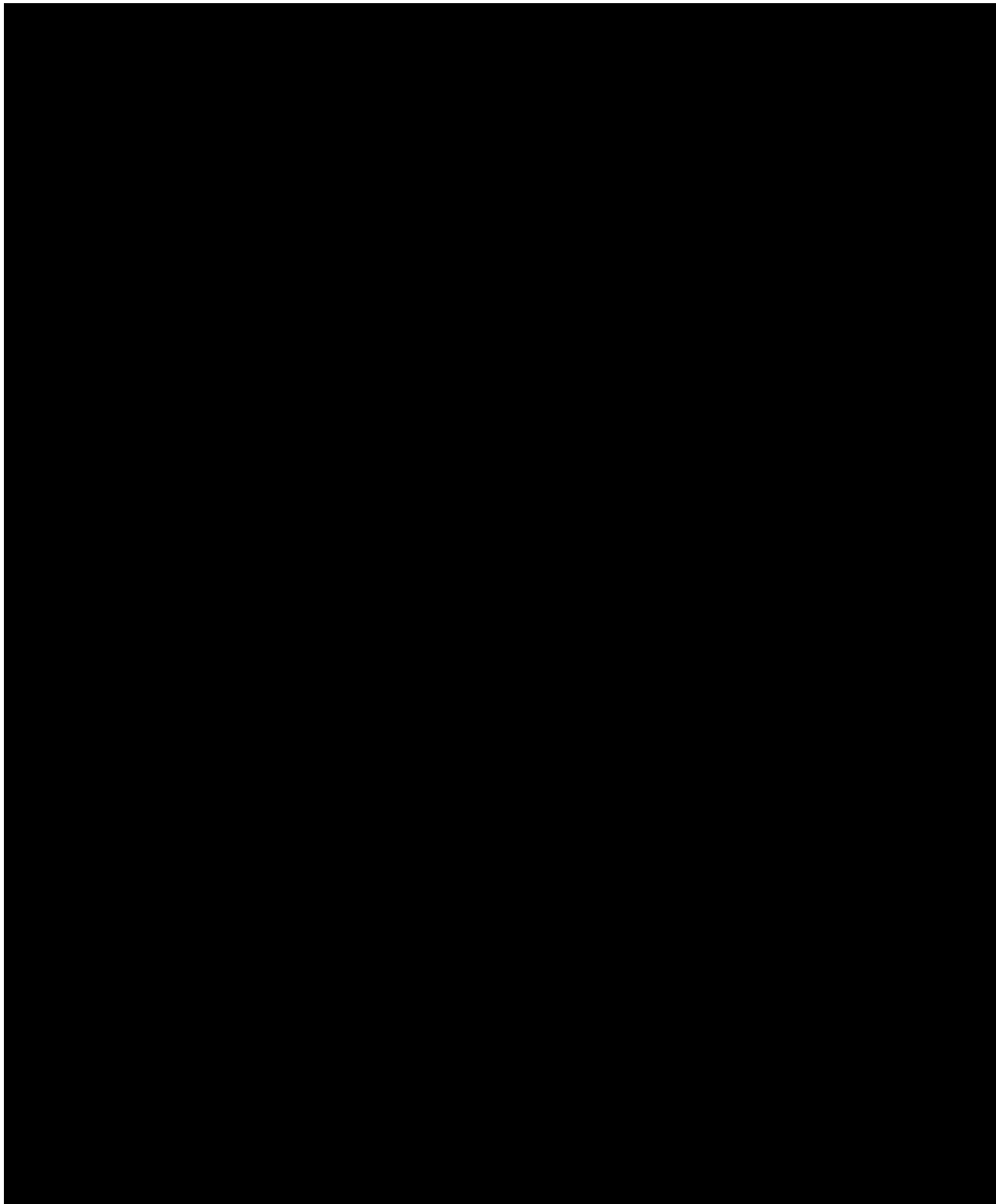
C2.1.1 Proposed Project Team’s Qualifications and Credentials

The team proposed for this partnership with MDE comprises former educators with national experience, as well as school district and state education leaders. Our team is ready, able, and available to produce all project deliverables on time and on budget. The following qualifications (**Exhibit 6**) and biographies (below) showcase the experience and qualifications of RTI team members and are reflective of the staff members who will ultimately work on this project. Full resumes are included in [Tab 2](#).

Exhibit 6. Attributes of Key Staff







C2.2 Prior Similar Projects

RTI has partnered with clients to deliver more than 60 strategic plans, leading organizations to set and meet ambitious goals for students and communities. RTI is committed to helping MDE create a thoughtful, dynamic, and intentional strategic plan that fits the specific needs of the state it serves.

The RTI team has worked with school districts, community colleges, and universities of many sizes, each serving diverse student groups. The following are highlights from RTI's portfolio of projects, showcasing the breadth of RTI's strategic support services. Project overviews represent recent projects providing services similar in nature to the scope and/or scale of the work in this solicitation.

University of North Carolina System Office | North Carolina *Strategic Planning and Implementation Support for Statewide Initiative*

From 2016 through 2019, RTI provided strategy and implementation support for the Laboratory Schools initiative to both the University of North Carolina (UNC) System Office and select campuses (UNC Charlotte, UNC Greensboro, Appalachian State University, and UNC Wilmington). Through this project, middle and elementary schools in underserved communities partnered with local public universities to spur innovation in the classroom through deeper university engagement in school leadership and operations. The first group of schools began operations in fall 2017. RTI's role included project management, strategic planning, stakeholder meeting facilitation, and direct implementation of technical support to both the System Office and the constituent schools.

RTI supported schools in the early-stage planning process, wherein schools developed the strategic components that set the direction of the project, including mission, vision, strategic priorities, and organizational structures. This support led to a 100% success rate with proposals to the UNC System's Board of Governors, the group that approved and oversaw this project.

The Laboratory Schools project presented unique challenges, not the least of which was the disruptive nature of founding a K-8 school run by a state school of education. RTI provided careful facilitation, adapted its approach to support each school appropriately, and built relationships at the system level within the universities and across the community.

Through this project, RTI helped to establish five schools that, together, educate almost 1,000 low-income students who attended previously low-performing schools. These new schools serve both as model schools for research-based instruction and as training centers for new teachers and school leaders.

York Technical College | South Carolina
Strategic Planning for the Communications and External Relations Division

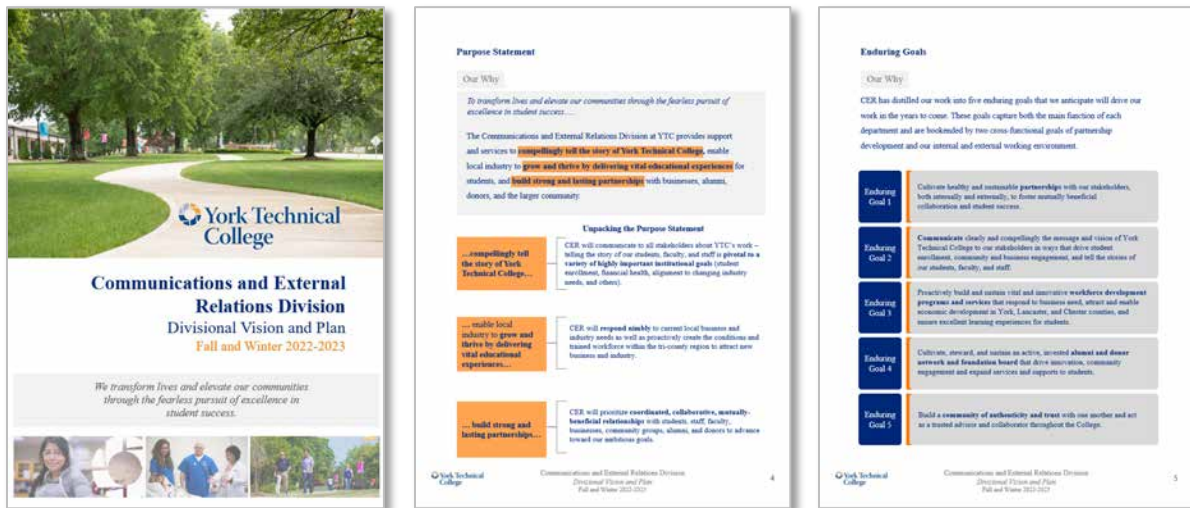
RTI worked with York Technical College (YTC) to support the success of its newly formed Communications and External Relations Division. This division represents more than 30 team members and is a combination of three former departments: Marketing & Communications, Workforce & Economic Development, and Advancement. These departments have traditionally operated autonomously—including goal-setting and strategic direction—and now must function as an effective unified division.

RTI specifically supported YTC in accomplishing the following tasks:

- Developing a shared vision and implementation plan that provides direction, purpose, structure, and processes for the newly formed Communications and External Relations Division.
- Identifying a path toward the creation of a high-quality, multiyear strategic plan that will guide the work of the division; this includes alignment with diversity, equity, and inclusion work impacting technical colleges across South Carolina.
- Incorporating targeted goals and a set of aligned actions to guide the division and set up a new leader of this division for success.

Excerpts of YTC’s Divisional Vision and Plan is included in **Exhibit 7**.

Exhibit 7. Excerpts of Strategic Plan for York Technical College



Loudoun County Public Schools | Virginia
Strategic Plan

RTI recently supported the Loudoun County Board of Education with the design of a new strategic plan that will guide the district through the next 5 years. Similar to other districts in the country, the climate in Loudoun County was politically charged. Amid this contentious environment, the RTI team facilitated dialogue and discussion in a nonpartisan and nonconfrontational manner that kept key partners focused on a carefully crafted question: What should be true of Loudoun County students by 2027? The team balanced the need to have tightly structured, productive conversations with the board’s desire to hear from constituents.

Strong facilitation and conflict management skills were key to the success of this partnership. Loudoun County Public Schools (LCPS) had more than 10,000 stakeholders involved in providing input on the strategic plan.

The full document outlining LCPS’s Strategic Plan for Excellence can be viewed at <https://www.lcps.org/Page/243565>, excerpts are included in **Exhibit 8**, and a sample of this plan can be found in **Tab 5**.

Exhibit 8. Excerpts of Strategic Plan for Loudoun County Public Schools



Durham Technical Community College | North Carolina
Cross-Institutional Strategic Planning

RTI is supporting Durham Technical Community College (DTCC) as the institution prioritizes postsecondary attainment for traditional community college students. Our first project began with DTCC and Durham Public Schools (DPS) to develop a cross-institutional implementation of a strategic process to increase the number of high school students attaining community college certificates, diplomas, and degrees concurrent with their graduation. RTI worked with both institutions to align their goals, strategies, and processes to achieve these strategic goals. This resulted in both governing boards—the DTCC Board of Trustees and the DPS Board of Education—as well as the respective executives in each to commit to a joint goal over the next 5-year period. RTI led the implementation team in setting goals, identifying a two-phased strategy for meeting those goals, establishing annual targets, and developing a systematic (quarterly) monitoring and reporting process to facilitate shared responsibility and accountability to achieve these results. This project has led to an increase in the number of students earning postsecondary credentials while in high school, the restructuring of an early college program, and contributions to expanded community and [national partnerships](#) to support more students as they earn credentials that lead to jobs in high-need and high-growth career pathways.

The success of this project prompted DTCC to pursue a second project with two additional school districts. The second phase of DTCCs vision for increased attainment has adapted lessons learned from the first project and begun to set goals and identify school- and district-specific strategies to inform implementation planning for these additional school districts.

Arlington Public Schools | Virginia Strategic Plan

Arlington Public Schools (APS) partnered with RTI to develop their 2024–2030 strategic plan through a collaborative process that emphasized the critical role of key stakeholders. The strategic plan serves as a roadmap to guide the district in providing high-quality educational opportunities that support the academic needs and well-being of all students. This strategic planning process was the first time the district had revisited its foundational direction since 2017. Through this engagement, RTI co-designed a strategic plan that focused on students as a core priority; developed and supported strong connections among schools, families, and the community; and reflected APS’s commitment to recruit, hire, and retain a high-quality and diverse workforce. Impacts of RTI’s support and co-design of the APS strategic plan development process included

- conducting more than 100 in-person and virtual focus groups;
- creating a comprehensive overview and analysis of school district data;
- soliciting community feedback via questionnaire from more than 6,800 participants;
- designing a communication toolkit for the questionnaire that resulted in a high number of responses, reflecting a 300% increase in engagement vs. APS’s 2017-18 process;
- developing comprehensive reports from each stage of community engagement that synthesized feedback from stakeholders into actionable next steps at key decision points; and
- securing unanimous adoption of the 2024 strategic plan by the Arlington Board of Education.

This strategic planning process was such a success that RTI will continue to support the implementation of the strategic plan and monitor its progress during the 2024-25 school year. Excerpts of APS’s strategic plan foundations are included in **Exhibit 9**.

Exhibit 9. Strategic Plan Foundations for Arlington Public Schools

The image displays two pages from the Arlington Public Schools 2024-30 Strategic Plan. The left page outlines the Vision, Mission, Core Values, and Priorities. The right page details the Performance Objectives across five categories: Student Academic Growth and Success, Student Well-Being, Student-Centered Instruction, Operational Excellence, and Student, Family, and Community Partnerships. Each objective includes specific goals and metrics to be achieved by 2030.

Wake County Public School System | North Carolina Strategic Plan

Wake County Public School System (WCPSS) partnered with RTI to develop its most recent strategic plan. RTI delivered a customized program of support based on the following priorities:

- Facilitate a series of WCPSS school board work sessions to capture the board’s vision and voice as part of the strategic planning process.
- Structure opportunities at various stages of the district’s strategic planning process for the board to provide input and feedback on themes and priorities.

RTI guided the district through a process to develop a new strategic plan that built on what has worked over the last 5 years and identified intentional strategies to increase impact. As part of this work, RTI also provided support to the WCPSS school board to improve their ability to address many challenging issues, especially those related to closing achievement gaps. RTI facilitated retreats, board meetings, and other constituent engagement events. To confirm a well-designed strategic plan, RTI supported WCPSS leadership in gaining buy-in from internal and external constituents about their goals, which in turn promoted significantly more success in achieving those goals.

RTI facilitated meetings with the executive leadership team and the district improvement team to develop revised strategic priorities that culminated in a new strategic plan. The priorities and actions defined in this new strategic plan will guide the work of the district over the next 5 years. The result is a strategy that can serve as a transformative tool to align the actions of the more than 10,000 WCPSS employees to better serve nearly 160,000 students. RTI provided expert facilitation, research-based tools, and proven project management practices to strategically help chart the course for the plan’s development.

Wake County Public Schools’ Strategic Plan can be viewed in full at <https://www.wcpss.net/strategic-plan>, and excerpts are included in **Exhibit 10**.

Exhibit 10. Excerpts of Strategic Plan for Wake County Public School System



Maryland State Department of Education | Maryland Implementation of State Strategic Initiatives

RTI is proud to partner with Maryland’s school districts to support the implementation of the Blueprint for Maryland’s Future, a transformative initiative passed by the Maryland General Assembly in 2021. The Blueprint’s goal is to provide equitable access to a world-class education for all public education students, ensuring they are prepared for college and careers. This

includes ensuring access to high-quality early childhood services, diversifying and enhancing teacher preparation and retention, and creating innovative, student-centered school models.

Through strategic partnerships with Maryland's local education agencies, RTI is helping districts implement the Blueprint's initiatives by leveraging a structured, phased approach that fosters collaboration, data-driven decision-making, and strategic alignment with state goals. Our experience in Maryland has been shaped by multiple engagements, including the Maryland Leads project and the Strategic Partner/Strategic Facilitator initiative, where RTI has guided districts in aligning their local-level project plans with the overarching vision of the Blueprint.

In our work with Maryland school districts, RTI uses a detailed, phased process designed to support districts in developing, refining, and implementing strategic decisions that align with the Blueprint for Maryland's Future. This approach emphasizes robust stakeholder engagement and ensures that districts are actively involved in shaping their plans. We assist districts with comprehensive data analysis and goal-setting to ensure that their implementation plans meet the Blueprint's expectations.

Oregon Department of Education | Oregon
Continuous Improvement Processes Project

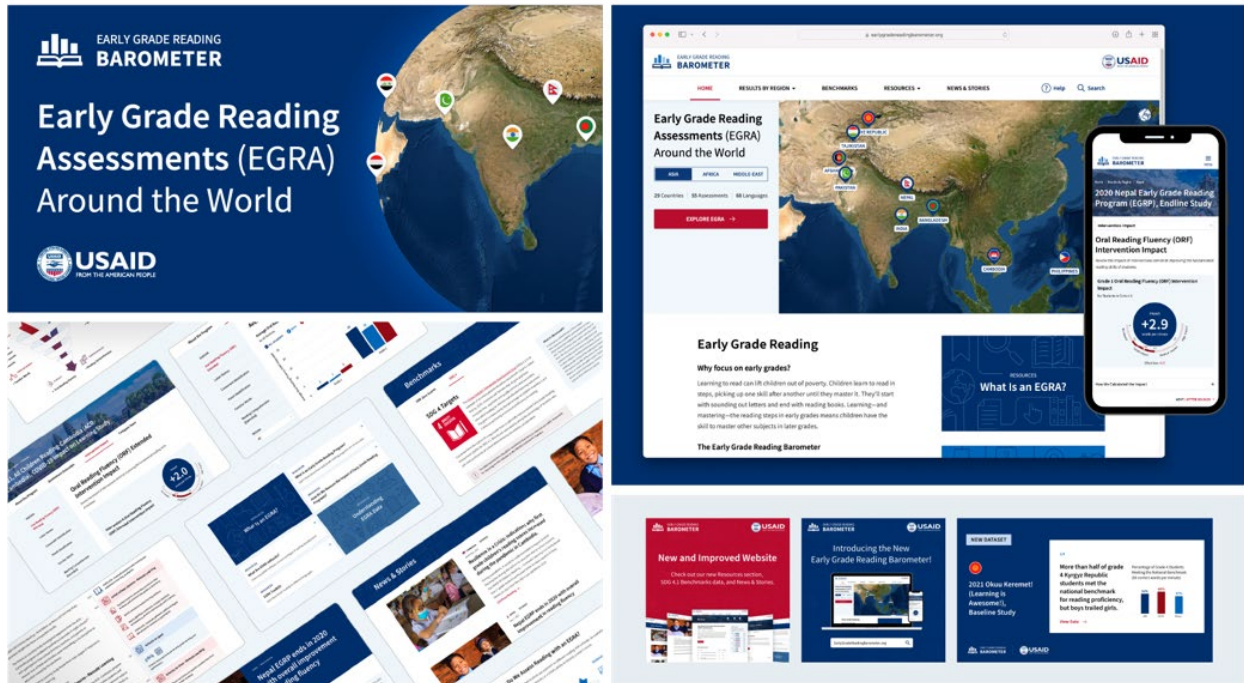
RTI supported the State of Oregon's Migrant Education Program by leading their most recent continuous improvement cycle to meet the U.S. Department of Education's Office of Migrant Education requirements for Title I Part C migrant programs. The three components of the continuous improvement cycle were program planning, driven by the results of a comprehensive needs assessment; implementation, guided by a service delivery plan; and a thorough program evaluation to assess performance results. Much like stakeholder engagement, the comprehensive needs assessment became a powerful tool to better understand and support the emerging needs within the state. Similar to a strategic plan development process, the service delivery plan embeds both project management and change management principles to ensure implementation is organized and deliberate in a way that anticipates challenges to the transformation efforts it puts forth.

USAID Asia Bureau | Global
Data Visualization

The Early Grade Reading Barometer makes it easy to explore how students in developing nations are making progress toward their national reading goals. Sponsored by the USAID Asia Bureau, the Barometer serves as a one-stop-shop for early grade reading data. The data in the Barometer is sourced from Early Grade Reading Assessments (EGRA), which use several subtasks to determine a child's reading abilities. RTI has worked with USAID since 2013 on the project and has provided support for product management, website development, branding, content creation, and server administration. The [Early Grade Reading Barometer website](#) disseminates several data sets of EGRA reading assessments from around the world.

Exhibit 11 illustrates a few screenshots of the site's data visualization tools.

Exhibit 11. Data Visualization Tools



U.S. Department of Education | National Interactive Scorecard

The [College Scorecard](#) allows users to search and compare institutions of higher education. It offers information to the public about the available fields of study, costs, admissions, student outcomes, and more. The data included in the College Scorecard data set ranges from the 1996-97 to 2020-21 school years and is available as a data file download or as part of an application programming interface (API). Given this large amount of data, RTI has partnered with the U.S. Department of Education to create a user-friendly way to sift through institutional characteristics such as enrollment data and student aid so that prospective students can easily discover alternative pathways to careers and can learn more about paying for college.

Exhibit 12 illustrates how RTI used user-experience (UX) and user-interface (UI) tools, along with significant user testing and strategic outreach, to develop and display comparison data in an easy-to-digest format. The user testing and outreach ensured user centricity, accessibility, and usability for the design and implementation of the consumer-facing website.

Exhibit 12. Samples of Comparison Data

U.S. DEPARTMENT OF EDUCATION College Scorecard

Home About the Data Search Compare: 5

SEARCH FOR:

- School
- Field of Study

Search by Name

University of Vir

Location

State: Virginia

Academic Fields

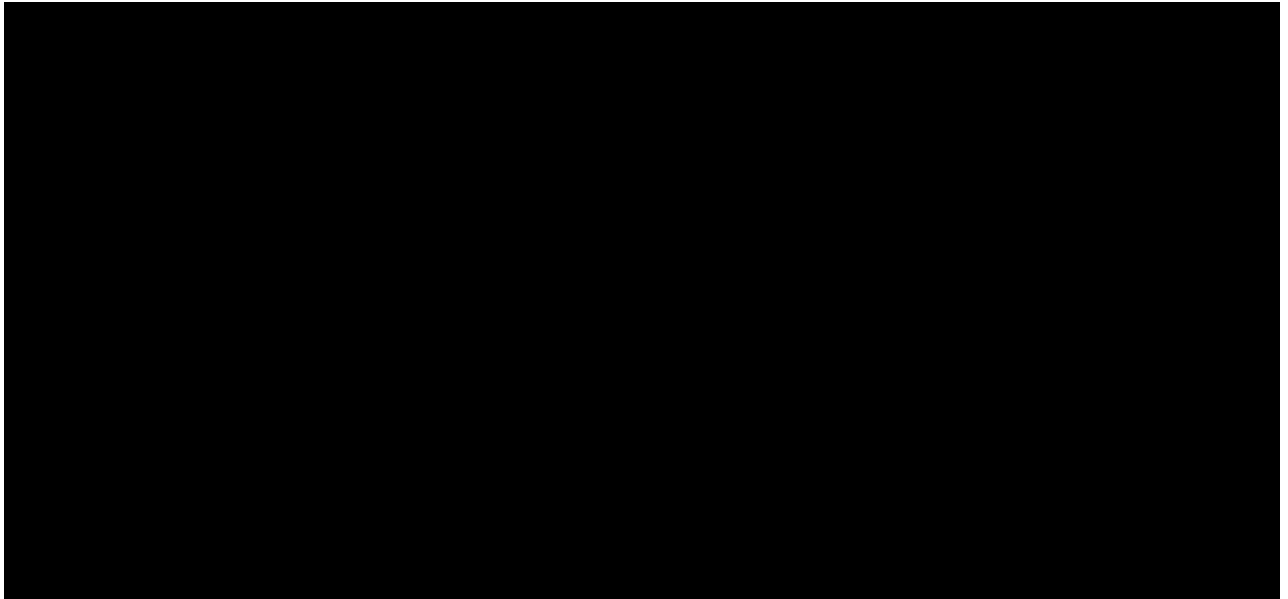
Start typing to search

13 Results CLEAR SORT SHARE

School Name	Location	Year	Type	City	Size	Graduation Rate	Average Annual Cost
University of Virginia-Main Campus	CHARLOTTESVILLE, VA	Year	Public	Suburban	Large	94%	\$22k
Virginia Polytechnic Institute and State University	BLACKSBURG, VA	Year	Public	City	Large	85%	
DeVry University-Virginia	ARLINGTON, VA	Year	Private For-Profit	City	Small	31%	
Chamberlain University-Virginia	VIENNA, VA	Year	Private For-Profit	Suburban	Small	65%	N/A

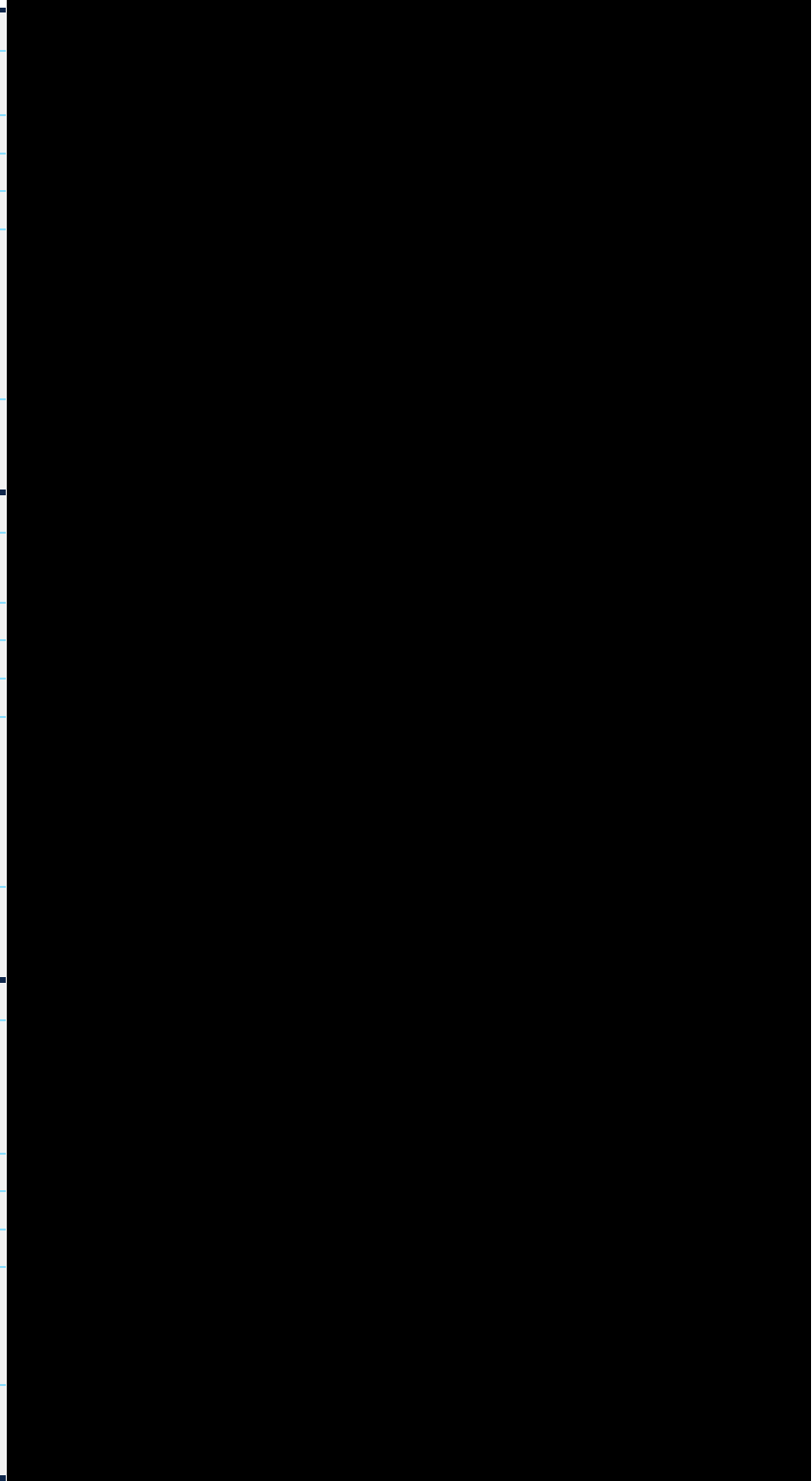
Ready to Compare: 5 Schools 0 Fields of Study

Tab 2: Resumes for Key Personnel



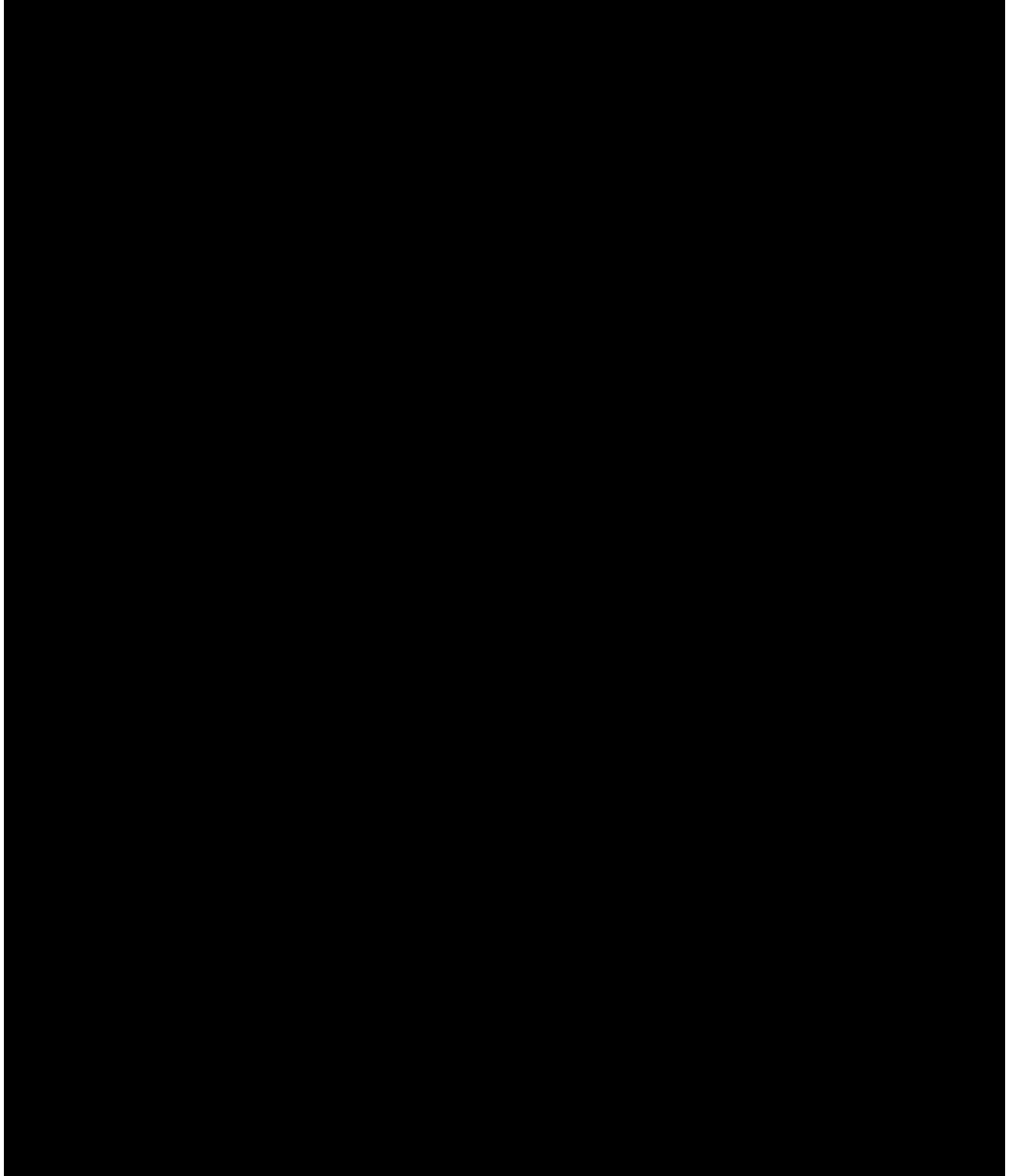
Tab 3: References

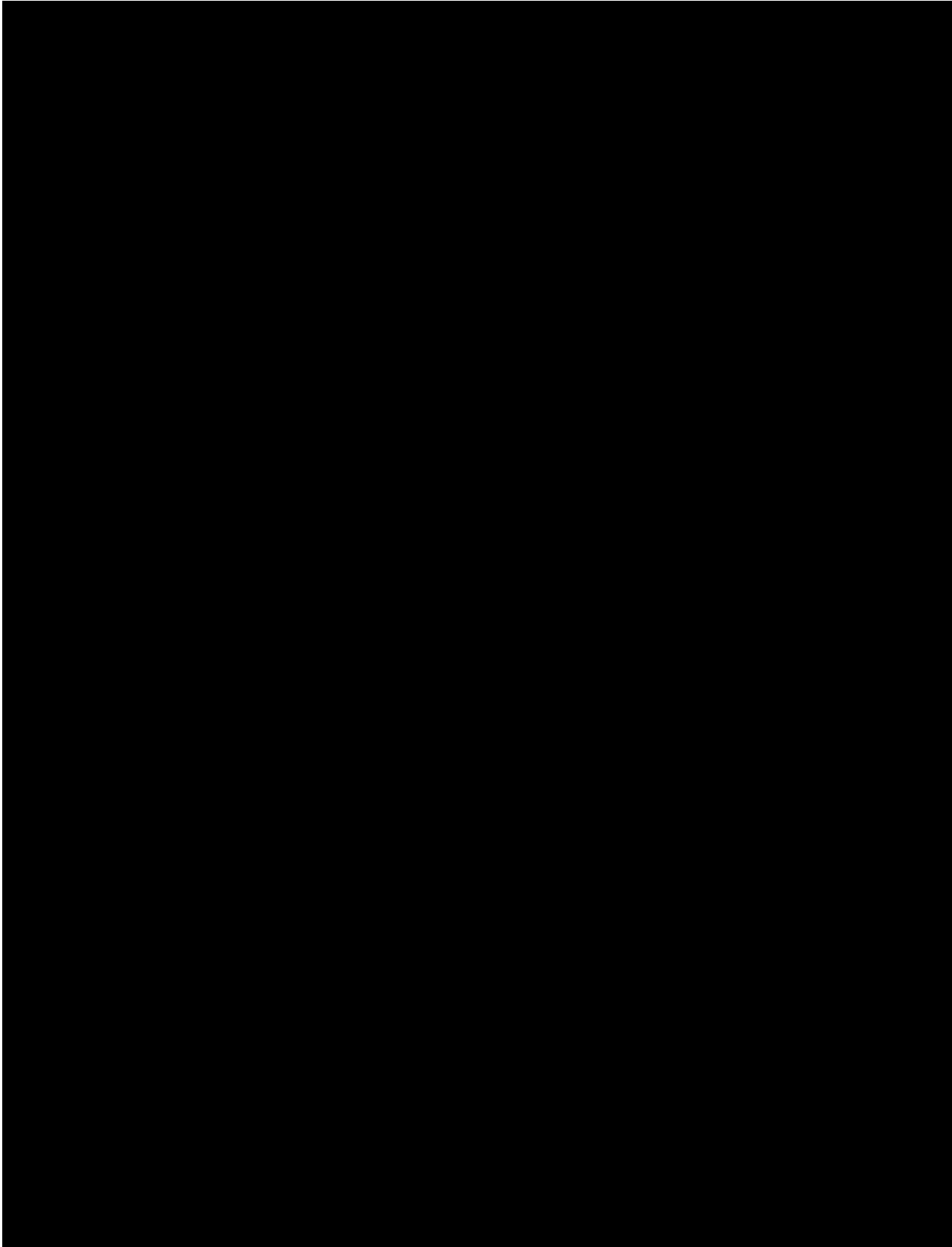
Client Name
Contact name and title
Contact address
Contract telephone number
Email address
Type of work provided to the client
Effective contract dates for the time frame services were/are being provided to client
Client Name
Contact name and title
Contact address
Contract telephone number
Email address
Type of work provided to the client
Effective contract dates for the time frame services were/are being provided to client
Client Name
Contact name and title
Contact address
Contract telephone number
Email address
Type of work provided to the client
Effective contract dates for the time frame services were/are being provided to client



Component 3: Price

Tab 4: Price/Budget





Tab 5: Work Samples

Sample Strategic Plan for Loudoun County Public Schools



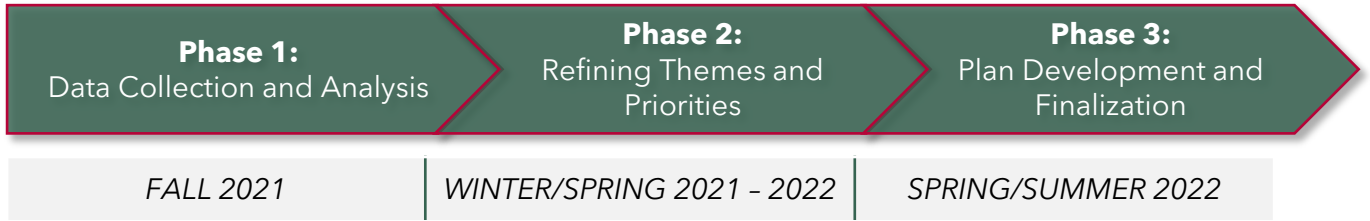
ONE LCPS | 2027

STRATEGIC PLAN FOR EXCELLENCE

June 2022 - For Approval

Strategic Planning Process Overview

A phased approach to layered engagement of Board, Staff, and community members has driven an inclusive and data-driven strategic planning process.



During the summer of 2021, the LCPS School Board in partnership with the Superintendent engaged in a comprehensive search and interview process before selecting RTI International to facilitate the process of developing and implementing a new, community-driven strategic plan to guide the division over the next five years. RTI is an independent, nonprofit research institute dedicated to improving the human condition - with vast expertise partnering alongside school districts to conduct an inclusive and data-driven strategic planning process through their Center for Education Services.

Throughout the fall semester, **Phase One** of the planning process focused on information gathering to ensure a foundational understanding of the current state of the division from which to build. This listening and learning period consisted of high-level data review and analysis, as well as a series of stakeholder engagement activities including informational interviews with School Board members and focus groups with multiple advisory committees. These conversations and initial data-gathering efforts revealed a number of emerging themes that went on to become key components of the Strategic Plan - including opportunities to expand access to specialized programming, align division culture, strengthen shared understanding of equity, rethink the division's approach to literacy instruction, enhance end-to-end teacher support, and provide open spaces for dialogue, among others.

Early in 2022, **Phase Two** planning commenced as preliminary themes and priorities were shared with the School Board and Senior Staff for feedback. This feedback then informed the creation and distribution of a community questionnaire designed to solicit reactions and insight from all LCPS parents, employees, and community business partners. More than 13,000 stakeholders completed the survey, with respondents indicating priority issue areas of focus for the new strategic plan to include: (1) ensuring that every child has the support to feel safe, happy, and cared for in school, (2) ensuring that LCPS maintains their overall quality of education as the division grows, and (3) providing a quality early education curriculum in reading and math.

Community questionnaire data informed a series of subsequent working sessions designed to review and refine an updated set of emerging priorities: in February with the School Board, March with Senior Staff, and April with Principals. Insights from these sessions helped to launch **Phase Three** of the planning process, in which an initial working draft plan - built around four central strategic goals: Empowered Students, Exemplary Staff, Enriched Division, and Engaged Community - was shared at five community town halls held across the division in mid-April. These sessions welcomed any/all community members to share their aspirations for LCPS students and reactions to the draft strategic framework through hands-on activities and small group discussion. Key takeaways from town hall discussions included a priority focus on academic rigor and instructional quality, specialized programs and elective course offerings, community and family engagement, and communications. Town hall feedback also identified equity as a polarizing topic that is top of mind, while highlighting a sense that strong public trust must be established, and constituents want to feel heard and valued.

Additional revisions to the draft strategic plan incorporating community feedback from the town hall sessions were again reviewed by the School Board and Senior Staff at a working session in May, where division leaders worked together to suggest further refinements to proposed strategic goals, aligned actions, and supporting measures.

This Strategic Plan will serve as a guidepost for our work. Additionally, we expect the plan to remain a living document over the next five years, allowing us to adapt specific supports, as needed, while remaining fixed on our strategic goals for students. Specific baselines and annual targets for all included measures will be established in the summer/fall of 2022. As part of a commitment to open communication and information sharing, LCPS Senior Staff will present regular Strategic Plan progress updates to the School Board and the public during scheduled Board meetings, with an annual presentation of division performance toward goals to be delivered each August.



LCPS Strategic Plan 2022 - 2027 | At A Glance



Our Vision: Every student will reach their full potential and achieve their dreams.

Our Mission: Empowering all students to make meaningful contributions to the world.

Strategic Goals



Students will be at the center of our work - valuing all students' hopes and dreams and preparing them to make meaningful contributions to the world.

GOAL 1: Prepare students to be knowledgeable critical thinkers, communicators, collaborators, creators, and contributors.



LCPS teachers, administrators, and staff are the most important factor in helping our students after their parents; seeing that staff are esteemed, exemplary, supported, and accountable is vital to student success.

GOAL 2: Cultivate high-performing teams of professionals committed to realizing our mission and goals.



LCPS must be aligned around our core educational mission for students and strengthen trust, listen humbly, value differences, and remain steadfast in ensuring every student is prepared to make meaningful contributions to the world.

GOAL 3: Maintain an inclusive, safe, caring, and rigorous learning environment as the foundation for student growth.



Parents, families, and our community must be a support, guide, ally, and partner; there is no one more deeply invested in the success of students than their families.

GOAL 4: Enhance educational excellence through building meaningful relationships with families and the community.

Core Values



HOLISTIC SUPPORT

Every student should have the support to feel safe, happy, and cared for in school.



EQUITY AND OPPORTUNITY

All students and staff should have access to resources, programs, and support that enable a successful future.



TRUST THROUGH LISTENING

All students, staff, and community members should have regular opportunities to be heard in two-way conversations across the division.

RIGOROUS TEACHING AND LEARNING

All students should be challenged to reach their full potential in the classroom as part of a system that aspires to become the best performing district in the nation.

INDIVIDUALIZED SUCCESS

All unique strengths, skills, and passions should be celebrated, encouraging diverse pathways that support readiness after graduation.

CONTINUOUS IMPROVEMENT

A culture of continuous improvement should drive the fulfillment of our mission.





GOAL 1 - EMPOWERED STUDENTS: *Prepare students to be knowledgeable critical thinkers, communicators, collaborators, creators, and contributors.*

- (1.1) Enable **Core Academic Excellence** by providing rigorous instruction for all students.
- (1.2) Expand opportunities for **Multiple, Accessible Pathways to Success** through diverse programming.
- (1.3) Prioritize **Care for Students** by ensuring a safe and affirming learning environment for all.
- (1.4) Create regular opportunities to amplify **Student Voice** through both listening and action.



GOAL 2 - EXEMPLARY STAFF: *Cultivate high-performing teams of professionals committed to realizing our mission and goals.*

- (2.1) Offer high-quality, **Ongoing Growth and Development** available to all staff.
- (2.2) Develop dedicated resources to improve **Professional Collaboration** across schools and the division.
- (2.3) Serve as an **Employer of Choice** committed to recruiting, developing, and supporting top diverse talent.



GOAL 3 - ENRICHED DIVISION: *Maintain an inclusive, safe, caring, and rigorous learning environment as the foundation for student growth.*

- (3.1) Define and promote an **Aligned Culture** across the division where all students feel they belong.
- (3.2) Standardize **Straightforward Communication** practices to improve data sharing and strengthen trust.
- (3.3) Create **Safe, Productive Learning Environments** designed to support high-quality instruction for all.



GOAL 4 - ENGAGED COMMUNITY: *Enhance educational excellence through building meaningful relationships with families and the community.*

- (4.1) Deepen **Family Engagement** by offering inclusive opportunities for conversation across the division.
- (4.2) Strengthen existing and create new **Business and Community Partnerships**.
- (4.3) Expand opportunities for **Trust-building Dialogue and Data** sharing to inform division-wide decisions.

NOTE: Progress toward all strategic goals and aligned actions listed above will be reviewed, assessed, and reported to both the School Board and the public via regular updates, with an annual goals presentation each August.



Tab 6: Signed Contingent Fee/Acknowledgement of Amendments

Appendix E – Acknowledgement of Amendments

Appendix F – Assurances and Certification

Appendix G – Release of Proposal as Public Record

Appendix H – Contracts

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](https://mdek12.org/procurement/rfp/) at <https://mdek12.org/procurement/rfp/> under MDE Bid **Announcements section**. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

January 22, 2025

Date

Eve Van Devender, Sr. Contracting Officer

Printed Name

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

January 29, 2025

Date

Eve Van Devender, Sr. Contracting Officer

Printed Name

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Eve Van Devender

Title: Sr. Contracting Officer

Signature:  Date: January 22, 2025

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors shall acknowledge which of the following statements is applicable regarding release of its proposal as a public record. *An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.*

Choose one:

X Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s **proposal and the** Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

State Board of Education Strategic Planning and Performance Scorecard

RFX No. 3120003047 | Due February 5, 2025

Submitted To:
Monique Corley, Office of Procurement
The Mississippi Department of Education
State Board of Education
359 North West Street
Jackson, MS 39201

Submitted By:
Kelsey Krausen, Project Director
WestEd
730 Harrison Street, Suite 500
San Francisco, CA 94107

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Proposal Cover Sheet (Appendix A)

Appendix A – Proposal Cover Sheet

Company/Name: WestEd

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Irene Wan, Manager, Proposal Coordination & Support
Mailing Address	730 Harrison Street
City, State, Zip	San Francisco, CA 94107-1242
Telephone:	415-615-3229
E-Mail Address:	id-help@wested.org


Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	
Telephone Number	
Email Address	
Physical Address	
City, State, Zip	
Mailing Address	
City, State, Zip	

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? 3100023968
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: Jan 29, 2025

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Component 1: Plan of Action

Tab 1: Production/Detailed Service Plan

WestEd’s Strategic Resource Allocation and Systems Planning team is well poised to partner with the Mississippi State Board of Education (SBE) to develop a comprehensive strategic plan and performance scorecard aligned with the state’s mission and vision. As a national, nonprofit leader in research, development, and service, WestEd has a successful track record of partnering with federal, state, and local educational agencies (LEAs) to improve educational systems and student outcomes. With more than half a century in the educational consulting sector, WestEd brings a wealth of experience and a robust portfolio of successfully completed strategic planning projects.

WestEd’s approach to strategic planning leverages data-driven methodologies while fostering collaborative engagement with a diverse array of education leaders and partners, including state leaders, local administrators and staff, educators, families, students, and community leaders across the state. This strategic collaboration is designed to yield actionable recommendations that empower the SBE to establish measurable goals and concrete strategies, ensuring the development of a comprehensive and sustainable strategic plan, performance scorecard, and plan for implementation and monitoring. Furthermore, by centering our process on collaboration, we ensure that the development of the plan is intricately aligned with the state’s mission, vision, and priorities.

Our approach includes several core components:

1. **Collaborative Engagement:** At the heart of our approach is a commitment to inclusive participation from a wide range of interest holders. This collaborative engagement ensures that the strategic plan reflects the diverse needs and aspirations of Mississippi’s educators, students, families, and communities.
2. **Data-Informed Decision-Making:** We employ advanced quantitative and qualitative research methodologies to inform development of the strategic plan. This involves conducting thorough environmental scans, analyzing existing data, and thoughtfully collecting additional insights through surveys and focus groups. By establishing Key Performance Indicators (KPIs) and Key Performance Measurements (KPMs), we ensure that all strategies and progress goals are underpinned by solid data and can be tracked over time.
3. **Sustainable Solutions:** Our emphasis on long-term sustainability means that we create strategic plans that can adapt to the evolving landscape of Mississippi’s educational context and available resources. Our team’s expertise in school finance and strategic resource allocation helps us ensure that the identified strategies and implementation

planning take into account the state’s current and evolving fiscal context, as well as student, school, and community needs.

4. **Professional Project Management:** We adhere to structured timelines and maintain clear, regular communication throughout our project work. Our use of robust project management practices and tools ensures that the strategic plan and other deliverables are submitted on time and within budget, while also allowing us to navigate any complexities that may arise during planning and implementation.
5. **Flexible, Solution-Oriented Approach:** WestEd employs a collaborative and proactive approach, including frequent communication and check-ins with SBE and Mississippi Department of Education (MDE) leaders. We provide options for addressing unforeseen challenges related to scheduling meetings and engagement sessions, timeline adjustments, or sensitive political dynamics.

Through our unique blend of strategic planning, applied research, and community engagement expertise, WestEd is dedicated to developing a strategic plan, performance scorecard, and implementation and monitoring plan that not only address Mississippi’s current needs but also anticipate and shape the future of the state’s public education system.

Project Initiation and Planning

WestEd offers the SBE a highly qualified partner in developing an effective, data-driven, sustainable strategic plan for equipping Mississippi’s students for success in college, the workforce, and life. WestEd’s approach leverages the expertise of our team of researchers, content-area experts, and engagement and facilitation specialists. Our approach includes the analysis of timely, actionable data and the development of accessible data visualizations and explanations for educational partners throughout the planning process. By making data accessible to a range of audiences and ensuring robust engagement and input, WestEd will support the SBE in developing an evidence-based planning and strategy-setting approach with public support and buy-in.

Kick-off Meeting

To initiate the project, WestEd will work with key SBE leaders and Board Designees to clarify objectives, timelines, and roles for the strategic planning process. The kick-off meeting agenda will be co-developed, and the meeting typically includes introductions, an overview of the project purpose and process, and a group discussion on desired outcomes. In preparation for the kick-off meeting, WestEd will review previous strategic plans and status reports, key educational data, and any other documentation that will inform the strategic planning process.

Project Work Plan

In partnership with SBE leaders and Board Designees, WestEd will develop a project plan that details the project scope, timelines, milestones, deliverables, communication protocols, research questions, and framework for engaging interest holders in the process. WestEd will create an

initial draft promptly upon project launch and will collaborate with SBE leaders and Board Designees to revise the plan as needed.

Stakeholder Identification

WestEd believes that for a strategic planning process to be successful, a broad range of interest holders must be engaged, utilizing a mix of engagement strategies and participatory processes. WestEd has conducted hundreds of focus groups, interviews and input sessions, facilitated town hall-style meetings, and successfully implemented large-scale community surveys with high response rates. This comprehensive engagement helps the project team collect actionable input for state agency leaders to utilize throughout the strategic planning process.

To that end, the WestEd team will partner with SBE leaders and Board Designees to identify key constituents to include within the engagement process, such as state board members, policymakers, local administrators, staff, educators, families, students, and local leaders. WestEd will also collaborate with SBE leaders and Board Designees to determine which engagement activities would be most appropriate for engaging each group, and at which point(s) in the process. In addition, the WestEd team will work to identify “key messengers”—leaders or prominent members who can encourage grassroots participation from the groups they represent—for as many of these groups as possible, thereby setting the stage for robust participation across a broad range of interest holders.

Environmental Scan and Data Collection

Review of Existing Documentation

To gather insight on the current priorities, initiatives, and context of the SBE and Mississippi’s K–12 educational system, the WestEd team will conduct a thorough and systematic review of existing documentation. Such documentation will include existing strategic plans and status reports; the Superintendent’s Annual Reports; internal organizational documents; and memos, analyses, or public reporting on statewide educational initiatives and supports. WestEd will document existing and past goals and measures and evaluate their effectiveness and functionality. This will inform the development of new goals and the development of effective and feasible KPIs for measurement of progress toward those goals.

Environmental Scan

To complement the document review and provide a fuller picture of Mississippi’s educational landscape, WestEd will conduct a comprehensive environmental scan. This systematic review and analysis may include but will not be limited to current educational policies and regulations, recent policy shifts and trends, technological advancements, funding and resource use, educational staffing data, demographic data, and Mississippi workforce needs. Additionally, to highlight strengths, areas of progress, and challenges facing Mississippi’s schools and students, this review will also include an analysis of student performance data and other key data.

Together, the document review and environmental scan will lay the foundation for understanding and summarizing trends, strengths, areas of progress, and challenges within Mississippi’s educational system, based on existing documentation and data. Importantly, this analysis will not only identify the trends but will seek to understand “why”—that is, what conditions are in place that may currently facilitate or hinder the success of Mississippi’s schools and students.

Stakeholder Interviews/Survey

To understand the experiences and priorities of a wide range of interest holders within Mississippi’s educational system, the WestEd team will collect qualitative data through individual and focus group interviews. The team may also administer a targeted survey if larger-scale data collection is needed to address certain research questions.

As described earlier, WestEd will work with SBE leaders and Board Designees to identify specific leaders and constituencies to include in the data collection, as well as key messengers to support recruitment efforts. The research team will develop a participant recruitment plan to ensure a representative and inclusive sample that reflects the diversity of those involved in and impacted by Mississippi’s educational system. This will include the use of a stratified selection process to ensure diverse and balanced representation within groups and across settings. This will also include a robust outreach effort that includes direct emails, office hours, and targeted outreach to LEAs, schools, technical assistance providers, and state leaders.

Interview protocols will focus on research questions established in the planning stages and will be further refined based on the environmental scan and each interview’s specific participant groups and topic areas of focus. WestEd will collaborate closely with the SBE leaders and Board Designees to refine the focus group protocols. Interviews will be conducted both in person and virtually, with most interviews conducted virtually to ensure greater reach.

SWOT Analysis

In educational systems, data plays a crucial role in shaping strategic planning by providing evidence-based insights that guide decision-making. By systematically collecting and analyzing data from a variety of sources—including those from the document review, environmental scan, and interviews/survey—leaders can make informed choices about their system’s future direction. This data-driven approach is intricately linked to the SWOT analysis (Strengths, Weaknesses, Opportunities, Threats), as it allows leaders to objectively assess their system’s capabilities and external conditions. Data from the document review, environmental scan, and interviews/survey will be triangulated and organized into the four categories of the SWOT analysis. The SWOT analysis thus allows the strategic plan to become a dynamic roadmap that not only leverages strengths and addresses weaknesses but also capitalizes on opportunities and mitigates potential threats, ensuring that Mississippi’s educational system is responsive to both challenges and innovations.

Upon completing the SWOT analysis, we will facilitate a process of sense-making with SBE leaders and Board Designees, craft a compelling data narrative, and provide clear visualizations to ensure comprehension and involvement across a variety of audiences. We will then connect our SWOT analysis findings to best practices and evidence-based strategies to address the SBE's strategic goals and priorities.

Strategy Development

Mission and Vision Review

To lay a common foundation for strategy development, WestEd will facilitate discussions with state leadership to revisit or reaffirm the SBE's mission, vision, and core values. WestEd will consult SBE leaders on which leaders should be included in these discussions and whether any other interest holders should be engaged in this step.

In these discussions, we will facilitate active engagement exercises (e.g., brainstorming, mapping the current and ideal future state, use of shared workspaces to workshop specific language) designed to elicit thoughtful input and foster a shared understanding of the SBE's and Mississippi's aspirational horizon. These discussions will serve as a platform for leaders to collectively explore both the broad visionary goals and the practical mission-driven steps necessary to propel the state forward and meet these goals.

Goal Setting

Based on the interviews/survey data, environmental scan, SWOT analysis, and mission and vision review, WestEd will work with SBE leaders and Board Designees to define what success means for students, review current system strengths and opportunity areas, and consider how to optimize key focus areas. Specifically, WestEd will guide SBE leaders and Board Designees through a process of selecting a set of key goals and associated strategies and actions. The SWOT analysis, which brings the range of data sources together into a comprehensive analysis, will provide the evidence-base for the discussions to identify strategic goals for each focus area and develop measurable objectives aligned with the state's education priorities. WestEd will summarize the draft strategic goals and objectives based on these discussions.

Strategy Formulation

In order to prioritize and finalize the key strategies and initiatives that address the needs and opportunities identified through the interviews/survey data, environmental scan, and SWOT analysis (and expressed through the goals), WestEd will facilitate a series of input sessions with education leaders and other interest holders. During these input sessions, participants will have an opportunity to review key findings from the environmental scan and interviews as the basis for discussions about their recommendations for high-leverage strategies and initiatives—including those related to educational outcomes, workforce readiness, and technology integration—that the state could prioritize. WestEd will analyze and summarize notes from the

input sessions and share them for review by SBE leaders and Board Designees to determine which key strategies to prioritize, as well as how to sequence these priorities based on current and anticipated state initiatives and funding.

Performance Scorecard Development

WestEd will utilize the data from the document review, environmental scan, and SWOT analysis to establish current performance base metrics and success indicators. WestEd will then seek to co-develop key performance indicators across each focus area, using an iterative process aligned with the collaborative goal setting. WestEd will also conduct a landscape scan of existing state scorecard and performance models to identify different approaches and best practices, and the team will develop a model wireframe scorecard for SBE/MDE.

Key Performance Indicator (KPI) Identification

Developing Key Performance Indicators (KPIs) in a statewide educational system requires a strategic approach focused on aligning these indicators with the state's overarching goals and addressing systemic needs. This work builds upon the preceding components, as it leverages the understanding of Mississippi's educational context developed through the Environmental Scan/Data Collection phase (described earlier), as well as the strategies and goals developed in the Strategy Development phase. WestEd will examine how existing and prior plans and goals align to newly developed plans and goals and analyze the functionality of previous metrics. Understanding past challenges and successes will ensure the new scorecard is poised for success.

We will collaboratively select multiple measures across various areas that effectively reflect the system's strategic goals. KPIs may cover many different areas such as student achievement, discipline, and attendance; teacher workforce; and resource allocation. This process is often iterative with the goal-setting process, refining goals to reflect data availability and collection feasibility, and planning data collection processes required for new goals and KPIs.

The selected KPIs must be measurable and actionable, which involves verifying data availability and establishing clear and technical definitions for each KPI. Refinement of the KPIs through continuous dialogue with interest holders and state leaders ensures that the KPIs resonate with those implementing and influencing educational policies. Meanwhile, setting meaningful targets and benchmarks informs the development of a framework for tracking progress and fostering accountability for improving system effectiveness and student outcomes.

Scorecard Design

WestEd will conduct a landscape scan of other states to identify best practices in the design and development of scorecard and performance models. We will work with a cross-disciplinary team of researchers, content area experts, and designers to develop a scorecard that is visually appealing, clear, and easy to understand and use. The scorecard will incorporate selected KPIs grouped by focus areas, with corresponding targets and indications of timelines and progress.

WestEd will develop technical documentation and business rules for the scorecard to provide information for the calculation of KPIs, the timing of their release, and identification of responsible parties for reporting and monitoring each KPI.

Data Collection Mechanisms

Through a comprehensive review of existing data systems and their documentation, WestEd will identify existing data collection mechanisms that align with and support the production of the scorecard. Consideration for data collection feasibility, timing, and processes will occur in tandem with the identification of additional KPIs to support measurement of progress toward the new goals. WestEd will develop documentation with supporting instruments for data collection plans and systems, including appropriate timelines and responsible parties.

Stakeholder Engagement and Workshops

Engagement Plan

To ensure robust and inclusive engagement of interest holders, WestEd will develop an engagement plan that ensures continuous involvement of internal and external interest holders throughout the process, from strategy formulation to approval of the final plan and scorecard. The engagement plan will take a multifaceted approach designed to maximize input, ensure equitable participation, and directly inform the development of concrete and measurable goals, strategies, and action steps. WestEd will create an initial draft of the engagement plan early in the strategic planning process and will collaborate with SBE leaders and Board Designees to revise the plan as needed. Contingency plans will address potential challenges such as scheduling conflicts or low participation rates, with measures in place to ensure confidentiality and build trust among participants.

Stakeholder Workshops

To gather feedback on the draft strategic plan and performance scorecard, WestEd will facilitate a series of in-person and virtual workshops for both internal and external interest holders. Separate sessions will be held for different groups of interest holders (e.g., internal sessions for state leaders and public sessions for external interest holders), and the content will be tailored for each audience accordingly. Our team will draft agendas, talking points, and accompanying presentation materials prior to the workshops and submit them for review and approval by SBE leaders and Board Designees.

Each workshop will first ground the conversation in the SBE's mission, vision, and values, and will then present an overview of the draft strategic plan and scorecard. Each workshop will then center upon engagement exercises to prompt reflection and solicit actionable feedback. Each workshop will be designed to be an authentic, transparent, and equitable experience where all feel they belong and can contribute to the conversation.

Workshops will be scheduled to accommodate varying schedules, including evenings and weekends as appropriate, to maximize participation. Additionally, online surveys will be developed and distributed to ensure interest holders unable to attend the workshops can still contribute their input and perspectives.

Feedback Incorporation

Feedback gathered during the workshops will be analyzed using survey tools and qualitative analysis software, including thematic coding to identify trends and priorities. These insights will be integrated with findings from the SWOT analysis, interviews, environmental scan, and input sessions. WestEd will then develop a summary report of interest holders' participation and feedback. WestEd will deliver this summary report to SBE leaders and Board Designees and facilitate discussions to review the feedback. Based upon these discussions, WestEd will revise the strategic plan and scorecard to incorporate key feedback.

Drafting and Finalizing the Strategic Plan

Draft Strategic Plan

Drawing from the results of the full strategic planning process (including data collection, analysis, strategy formulation, and rounds of feedback from internal and external interest holders), WestEd will produce a clear and comprehensive strategic plan. The strategic plan will include a summary of the strategic planning process and its participants; the core contents of the strategic plan, including the mission, values, vision, strategic goals, key initiatives, and performance scorecard; and the intended next steps to implement and track progress on the plan.

The WestEd team brings extensive experience writing strategic plans, policy reports, and actionable recommendations. Rather than producing long narrative reports where research, project goals, and implications are difficult to track, the team focuses on developing high-impact reports that clearly and impactfully describe research findings, implications, and recommendations so that reports are actionable. This requires a mix of well-designed visual displays of data and information in a clear and coherent narrative. Special efforts will be made to ensure that the plan—and any companion tools—are accessible to as broad an audience as possible.

Review and Revision

After drafting the strategic plan and performance scorecard, WestEd will submit the drafts to SBE leaders and Board Designees for review. WestEd will collect SBE leaders and Board Designees' feedback through both collaborative discussions and asynchronous communications and, through multiple rounds of leadership review, will incorporate the feedback into the strategic plan and scorecard. Through this iterative process of review and revisions, WestEd will collaborate with SBE leaders and Board Designees to ensure that the strategic plan is clear, actionable, and visually compelling, and that it includes concrete strategies and action steps,

timelines, responsible parties, measures for ongoing evaluation, and all other necessary components for successful adoption and implementation.

Final Strategic Plan

Once the strategic plan and performance scorecard have received all necessary approvals, the WestEd team will submit the final drafts to WestEd’s Communications Department. The team will then work with WestEd’s professional copy editors, designers, and accessibility specialists to provide copy editing, proofreading, formatting, visual design, and printing of the final deliverables, including ensuring that deliverables meet Section 504 compliance accessibility requirements.

Final Presentation and Handover

Presentation to the Board

The WestEd team will work with SBE leaders and Board Designees to schedule a session to present the final strategic plan and performance scorecard to the full board. The WestEd team has prior experience testifying in front of state leaders, including boards, commissions, and legislatures, about research findings, proposed strategies, and the importance of recommended action steps. The presentation will be scheduled at the convenience of the board and will include time for questions, answers, and discussions.

Documentation Handover

WestEd will provide the SBE with all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats. As noted earlier, WestEd’s Communications Department will ensure that all documents are polished, visually appealing, and compliant with Section 504 accessibility requirements.

Training Session

WestEd will collaborate with SBE leaders to conduct a training session for all relevant staff on how to use and monitor the performance scorecard to ensure proper implementation. The session will be interactive and include hands-on opportunities to practice using the performance scorecard with sample data. WestEd proposes hosting the session virtually (or potentially in a hybrid format) so that it can be recorded and shared with additional staff in the future; the WestEd team has extensive experience hosting engaging, interactive virtual/hybrid training sessions. WestEd will also share accompanying session materials, such as presentation slides and instructions, for the SBE/MDE’s future use.

Implementation and Monitoring Plan

Implementation Roadmap

WestEd will work closely with SBE leaders and Board Designees to co-develop a detailed implementation plan, including roles, responsibilities, timelines, and required resources to ensure the implementation plan is clear and actionable. The WestEd team will work with the SBE to recommend an ongoing approach to measuring and assessing the implementation of the strategic plan. As noted earlier, the WestEd team will use the environmental scan, data collection, SWOT analysis, and interest holder engagements to inform recommendations on which data to use to track implementation progress and measurable outcomes.

To support implementation, WestEd will create a three-phase, five-year implementation roadmap.

Phase 1: Rollout and Communication Plan

1. Co-develop a high-level communication plan with the SBE/MDE, detailing how the SBE/MDE will educate district leaders, school leaders, and community members about the new strategic plan. Communication will highlight how the strategic plan goals were decided upon, including relevant data, as well as the role that interest holders' input had in shaping the plan. During this time, the SBE/MDE will also share with each audience how often and through what channels the state plans to communicate progress.

Phase 2: Planning for Action

1. WestEd will work with the SBE/MDE to create a subcommittee for each strategic plan goal with a clear chairperson to spearhead progress on relevant strategies. These subcommittees will include the relevant SBE/MDE staff and can include other key interest holders.
2. WestEd will support each subcommittee in creating a five-year plan that breaks each strategy into concrete action items in the most efficacious order and identifies any possible implementation roadblocks.
3. WestEd will support the SBE/MDE in gathering the budget team and leadership from human resources and across program areas to discuss how the new Mississippi Student Funding Formula supports the goals of the strategic plan and ensure alignment with other state priorities and initiatives.

Phase 3: Creating Annual Processes

4. WestEd, using input from SBE/MDE staff, will develop a comprehensive calendar outlining the following:
 - a. When relevant data points will be collected and through which channels
 - b. Bi-annual updates for the SBE
 - c. Regular communication points with key interest holders, including families and community members, about progress

- d. Annual continuous improvement reviews to determine if strategies need to be shifted, expanded, or concluded

Monitoring and Reporting Mechanism

Our team will work closely with SBE leaders and Board Designees to ensure that the strategic planning process is aligned with the state's specific needs and that it reflects Mississippi priorities for the next five years. The WestEd team will also help to ensure that the strategic plan is not just another plan that sits on a shelf. Rather, WestEd will work with SBE leaders and Board Designees to recommend an ongoing approach to measuring and assessing the implementation of the Strategic Plan and the Performance Scorecard, specifically through the use of KPIs.

The WestEd team will work with SBE and Board Designees to develop interim data milestones and identify the positions responsible for and the cadence of collecting and reporting these data to internal interest holders, the board of education, and broader external audiences. The reporting mechanism will include both internal reports as well as clear and simplified visuals for public reporting.

To monitor the scorecard and KPIs, WestEd will establish adaptive feedback mechanisms that are informed by continuous interest holder engagement, allowing for the evolution of KPIs as needed based on interim evaluations. This iterative process maintains the alignment of KPIs with changing conditions and emerging challenges, ensuring they remain robust tools for accountability and improvement in educational outcomes. A plan for regular reporting ensures that findings are understood and actionable, contributing to informed decision-making and strategic adjustments.

Review and Adjustment Protocol

WestEd will work with SBE and Board Designees to create a review and adjustment protocol that allows the state to continue or expand what is working, make adjustments to strategies that are less successful but have promise, and conclude strategies that are not providing sufficient return on investment toward goals. The protocol will take into account shifts that may be warranted due to changing conditions in the areas of enrollment and demographics, revenue and economic climate, and shifting state and federal priorities.

Table 1. Project Timeline

Task	Timeline
Project Initiation and Planning	
Kickoff Meeting	March 2025
Project Work Plan	March 2025
Stakeholder Identification	March 2025
Environmental Scan and Data Collection	
Review of Existing Documentation	March – April 2025
Environmental Scan	March – April 2025
Stakeholder Surveys/Interviews	April – May 2025
SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)	May 2025
Strategy Development	
Mission and Vision Review	June 2025
Goal Setting	June 2025
Strategy Formulation	June 2025
Performance Scorecard Development	
KPI Identification	June 2025
Scorecard Design	June 2025
Data Collection Mechanisms	June 2025
Stakeholder Engagement and Workshops	
Stakeholder Workshops	June – July 2025
Engagement Plan	April 2025
Feedback Incorporation	August 2025
Drafting and Finalizing the Strategic Plan	
Draft Strategic Plan	June 2025
Review and Revision	August 2025
Final Strategic Plan	September 2025
Final Presentation and Handover	
Presentation to the Board	September 2025
Documentation Handover	September 2025
Training Session	By October 1, 2025 per RFP
Implementation and Monitoring Plan	
Implementation Roadmap	October 2025 – February 2026
Monitoring and Reporting Mechanism	November 2025 – January 2026
Review and Adjustment Protocol	November 2025 – January 2026

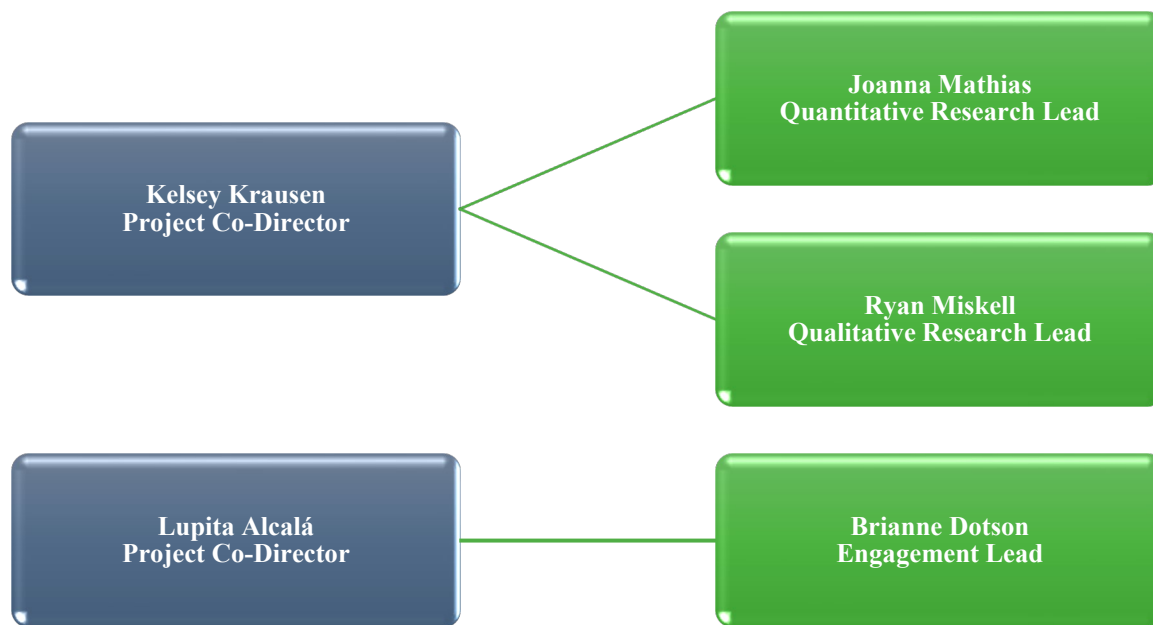
Component 2: Administration

WestEd offers a team of strategic planning, research, outreach and engagement, and implementation experts with on-the-ground practitioner experience working with state education agencies, school districts, institutes of higher education, and tribal governments. The proposed team has experience serving institutions of higher education and K–12 systems on topics ranging from strategic planning and implementation to resource allocation, accountability and support systems, organizational reviews, and broader education system improvement efforts. Our team members have been part of planning, leading, designing, and transforming both operational and instructional systems of state, regional, and local school and college systems of similar complexity to MDE. Moreover, the WestEd project team has extensive experience providing research support and technical assistance to colleges, school districts, and state education agencies to ensure that research is actionable and impactful.

The project team will be led by Dr. Kelsey Krausen and Lupita Alcalá, seasoned project directors with extensive track records leading successful strategic planning projects for states, school districts, and institutes of higher education. Dr. Krausen will oversee the work of the quantitative and qualitative research teams, in coordination with the leads, and will serve as lead writer for the strategic plan. Alcalá will oversee interest holder engagement for the project in partnership with the engagement lead. Dr. Krausen and Alcalá will both work closely with SBE and MDE staff. A team of strategic planning and policy experts, researchers, and former practitioners will also support the work. A project organization chart is provided in Figure 1, followed by brief biographies of proposed key personnel. Resumes for key personnel are provided in Tab 2.

WestEd assures agreement and compliance with Appendix B—Standard Terms and Conditions of RFX Number .3120003047.

Figure 1. Project Organization Chart



WestEd 2025

Key Personnel

Dr. Kelsey Krausen | Project Co-Director

Kelsey Krausen, PhD, is the Director of WestEd’s Strategic Resource Allocation and Systems Planning team and is the proposed project co-director. With more than two decades of experience in education, Dr. Krausen has expertise in areas including higher education and K–12 strategic planning and resource allocation and education leadership. She focuses her work on improving outcomes for students in underserved communities through the strategic and equitable allocation of resources and systems improvement. Dr. Krausen has provided technical assistance and conducted research to support the state education agencies in Oklahoma, California, North Carolina, New Mexico, and Nevada. Dr. Krausen also has experience leading strategic planning efforts and organizational reviews for state education agency departments, institutes of higher education, and LEAs. Dr. Krausen has a PhD in school organization and educational policy from the University of California.

Lupita Alcalá | Project Co-Director

Lupita Alcalá, EdM, is a Director of Education Policy and Outcomes with WestEd’s Strategic Resource Allocation and Systems Planning team and is the proposed project co-director. She has 25 years of experience championing equitable educational outcomes for children and adults, and over a decade of experience in government affairs for PreK–12 and higher education. Her areas of expertise include early education, K–12, and higher education

systems, including promoting, implementing, streamlining, and revising policies and programs regarding PreK–16 transitions, college affordability, financial aid, career pathways, and workforce development. As the Director of the California Student Aid Commission, she was a prominent voice and leader in statewide policies on college cost and financial aid reform. As the Deputy Superintendent of the California Department of Education, she directed and oversaw over \$1 billion in new investments in career and technical education, aimed at expanding college and career opportunities for all students, with particular attention to those in underserved communities. Alcalá has extensive political and social knowledge related to the Latinx community. Alcalá has a BA in political science from the University of California, San Diego, and an EdM from Harvard University School of Education.

Dr. Joanna Mathias | Research Co-Lead

Joanna Mathias, PhD, is a Senior Research Associate with WestEd’s Strategic Resource Allocation and Systems Planning team and is the proposed quantitative research lead. Her work includes analyses of transfer student pathways and experiences in California Community Colleges, California College Promise programs, and the effect of school finance reform in California on student achievement; directing quantitative data collection and analysis in community college master planning; and cost analysis of 13th year programs. She is an experienced policy researcher with expertise in the economics of education, education policy, and statistics and econometrics. Dr. Mathias has particular expertise in guiding insightful and intersectional descriptive data work and leveraging quasi-experimental and machine learning econometric methods on large institutional and administrative data sets for causal inference. She has previously worked in partnership with the California Department of Education, California State Universities, and California Community Colleges, and has expertise working with complex multi-agency student-level data in collaboration with a variety of educational agencies, including the California Longitudinal Pupil Achievement Data System (CALPADS), the California Department of Education, and the California Community Colleges Chancellor’s Office. Dr. Mathias’ recent work has focused on college and career readiness, particularly on access and equity in career and technical education and dual enrollment, in addition to college and career readiness in accountability systems. Dr. Mathias holds a PhD in School Organization & Education Policy from the University of California at Davis, and an MS in Economics from North Carolina State University.

Ryan Miskell | Research Co-Lead

Ryan Miskell, PhD is a Senior Research Associate at WestEd and is the proposed qualitative research lead. Dr. Miskell has experience with quantitative and qualitative methodologies and contributes to various program evaluations at the school, district, state, and foundation level. His recent work has included evaluations of the Deeper Learning Study Tours organized by the American Youth Policy Forum, the special education programs in two Maryland school districts, and monitoring of the U.S. Department of Education’s Charter School

Program and Magnet School Assistance Program grantees. Prior to joining WestEd in 2015, Dr. Miskell was a post-doctoral fellow with the Oklahoma Center for Education Policy and a teacher with Tulsa Public Schools in Oklahoma. He received a BA in political science from American University; an MEd in education administration, curriculum, and supervision from the University of Oklahoma; and a PhD in education leadership and policy studies from the University of Oklahoma.

Dr. Brianne Dotson | Engagement Lead

Brianne Dotson, EdD, is a Senior Systems Change Associate with WestEd’s Strategic Resource Allocation and Systems Planning team and is the proposed engagement lead. Dr. Dotson specializes in equity-focused systems change, district and school improvement, and leadership development. She partners with states and districts to achieve these outcomes through data-driven decision-making, strategic planning, and continuous improvement. Prior to joining WestEd, Dr. Dotson served as an English language arts teacher, assistant principal, elementary school principal, and principal coach primarily in historically underserved communities. She also served as the Director of Organizational Impact at TeachingWorks at the University of Michigan, where she led a cross-functional team that supported teachers and teacher educators across the country in disrupting racism and advancing equity through skillful instruction. Dr. Dotson holds an EdD from Michigan State University, an EdM from the Harvard Graduate School of Education, and a BA from the University of Southern California.

Minimum Qualifications

Please see the “Minimum Qualifications Attachment” section at the end of this proposal for the required minimum qualifications documentation.

Company Profile

WestEd is a preeminent educational research, development, and service agency, known for integrating research into practice for more than 50 years (29 years in our current status as a Joint Powers Agency), with more than 1,000 employees and 13 offices nationwide. Over the past five years, the average number of employees at the Agency has been 1,190.

The agency is dedicated to promoting excellence, achieving equity, and enhancing learning for individuals of all ages. WestEd fosters large-scale school improvement and innovative change efforts through research and development, training,



See the About Us menu bar on [WestEd.org](https://www.wested.org) for further information about:

- The organization
- Our Board of Trustees
- Organizational leadership
- Our mission for equity
- Office locations

technical assistance, and collaboration with policymakers and educators. Through this work, WestEd has built solid relationships with education and community organizations, playing key roles in facilitating the efforts of others and in initiating important new improvement ventures.

WestEd is a Joint Powers Agency (JPA) governed by public entities in Arizona, California, Nevada, and Utah, with Board members representing agencies from these states and nationally. Its two predecessors, Far West Laboratory for Educational Research and Development (FWL) and Southwest Regional Laboratory (SWRL) were JPAs created in 1966. WestEd is a nonpartisan, not-for-profit organization that is tax exempt under Section 115(1) of the Internal Revenue Code (EIN 94-3233542). FWL and SWRL combined to form WestEd, a Joint Powers Agency, in 1995 as evidenced by our JPA filing document. WestEd is categorized as a public agency under California government code 6500, the Joint Powers Act. Locations of Work

The Vendor agrees that it shall provide all services directly related to this contract from offices located within the United States. Locations of work performed outside of the state of Mississippi are listed below.

- Alameda, California
- Cupertino, California
- Sacramento, California
- Colorado Springs, Colorado
- Ann Arbor, Michigan

Tab 2: Resumes for Key Personnel

Kelsey Krausen

WestEd, 2470 Mariner Square Loop, Alameda, CA 94501

SUMMARY OF RELATED EXPERIENCE

Kelsey Krausen, PhD, is the Director of the Strategic Resource Allocation and Systems Planning Team at WestEd. With more than two decades of experience in education, her areas of expertise include accountability systems, education finance, and systems improvement. A native of Oakland, California, Krausen focuses her work on improving outcomes for students in underserved communities through the strategic and equitable allocation of resources. With experience as a qualitative research, educator, and systems improvement coach, Krausen has worked on a range of research projects including research for the Student Centered Funding Formula Oversight Committee, design and development of Oklahoma's Resource Allocation Review Process, and research on New Mexico's Community Schools.

Krausen also led the school finance research that brought to light the "Silent Recession": a nationwide phenomenon in which, even with increasing levels of school funding, school districts face financial pressures that threaten to destabilize their budgets and force reductions in student services. Krausen also led her WestEd team in the development of four policy briefs on strategies that district leaders can use to leverage federal relief dollars to accelerate student learning and address students' physical, social, and emotional well-being.

EDUCATION

2016 PhD, Education, University of California at Davis, Davis, CA

2006 MA, Public Administration, San Francisco State University, San Francisco, CA

2000 BA, Literature, University of California at San Diego, San Diego, CA

PROFESSIONAL EXPERIENCE

2023–Present

**Director, Strategic Resource Allocation and Systems Planning Team
WestEd, Alameda, CA**

Oversees and guides the agency's school finance, governance and system planning work, supporting state and local education agencies to more equitably, strategically, and sustainably allocate resources and plan for improved student outcomes. The team has worked with over a dozen states to investigate and analyze improvements in their school funding systems, as well as providing strategic planning and organizational reviews in numerous K–12 and higher education systems.

2019–2023

**Senior Engagement Manager, Strategic Resource Allocation and Systems Planning Team
WestEd, Alameda, CA**

Provided technical assistance and research support to districts and state partners through stakeholder engagement, data analysis, strategic planning, meeting facilitation, and improvement science–based implementation strategies. Led or managed resource allocation project teams (clients include the California Department of Finance and Legislature, Rhode Island College, the California Department of Education, and others).

2017–2019

**Senior Research Associate, Comprehensive School Assistance Program
WestEd, Alameda, CA**

Provided expertise and experience for writing and research projects on issues of accountability, resource allocation, and systems improvement. Also supported strategic planning and resource development for local and state education agencies across the United States.

2013–2017

**Senior Education Research Fellow
Office of Attorney General Kamala D. Harris, San Francisco, CA**

Conducted research statewide on truancy and chronic absence at the elementary school level. A major component of work included conducting the research and writing for the attorney general’s 2013, 2014, 2015, and 2016 reports on elementary school truancy and chronic absence, *In School + On Track*.

2012–2017

**Consultant, Education Research
Oakland, CA**

Conducted research and provided writing support on a range of projects including the design of an incentive–based funding model for the California Community Colleges Chancellor’s Office and contributions to a repository of promising practices that offer school districts a bank of strategies to consider as they develop their Local Control and Accountability Plans (LCAPs). Clients included WestEd, California School Boards Association (CSBA), and New Tech Network.

2011–2017

**Postdoctoral Researcher/Graduate Student Researcher, School of Education
University of California at Davis, Davis, CA**

Collaborated on research design and the collection and analysis of data on multiple research projects, and coauthored research reports and policy briefs.

2003–2010

Assistant Director, Policy
National Writing Project, Berkeley, CA

Tracked, analyzed, and supported the coordination of the National Writing Project’s year-round legislative campaign; participated in meetings with legislators and legislative aides, and promoted visibility and supported strategic communication for the organization.

SELECTED PUBLICATIONS AND PRESENTATIONS

Justus, M., Krausen, K., Eisenberg, L., & Willis, J. (2023). *Put your money on the table: Interagency coordination to address the crisis in student mental and behavioral health*. WestEd.

Krausen, K., Caparas, R., McClellan, P., Willis, J., & Perez, A. (2023). *Is there a “fiscal cliff” on the horizon for California school districts? Planning for financial sustainability in an uncertain time*. WestEd.

Krausen, K., Tanner, S., Caparas, R., Makkonen, R., Burr, E., & Mathias, J. (2022). *Evaluation of California’s Differentiated Assistance*. WestEd.

Chambers, D., Krausen, K., & Willis, J. (2021). *Adapting a Cardinal Rule of Finance: Five Strategies for Using One-Time Federal Funding on School Staffing*. WestEd.

Krausen, K., Diaz, J., Willis, J., & Lias, C. (2021). *Following Through: 5 Strategies for Getting Federal Relief Aid to Students Who Need It Most*. WestEd.

Bowman, A., Valdez, A., Krausen, K., & Donahue, C. (2021). *Getting better at getting more equitable: Addressing racial inequities in education using equity-driven continuous improvement*. WestEd.

Willis, J., Krausen, K., & McClellan, P. (2021). *Meeting the moment: How education leaders can maximize federal COVID relief aid to support more equitable student learning*. WestEd.

Willis, J., Krausen, K., & McClellan, P. (2021). *Three Strategies for Investing One-Time Federal Relief Aid to Make a Lasting Difference: Sustainable Financing of Education Innovations*. WestEd.

Willis, J., Doutre, S. M., Krausen, K., Barrett, T., Ripma, T., & Caparas, R. (2020). *California special education funding study: A descriptive analysis of special education funding in California*. WestEd. https://www.wested.org/wp-content/uploads/2020/10/WestEd_SpecialEdFundingReport_Final_508.pdf

Krausen, K., Caparas, R., Ripma, T., & Willis, J. (2020). *Strategic resource allocation for the 21st century: How state leaders can address the Silent Recession*. WestEd. https://www.wested.org/wp-content/uploads/2020/05/Silent_Recession_III_Strategic_Resource_Allocation_ExecSummary.pdf

Valdez, A., Takahashi, S., Krausen, K., Bowman, A., & Gurrola, E. (2020). *Getting better at getting more equitable: Opportunities and barriers for using continuous improvement to advance educational equity*. WestEd.

Krausen, K., Caparas, R., & Mattson, H. (2019). “We shake hands at the door”: *How a focus on relationships is driving improvement in Chula Vista*. WestEd.

Krausen, K., & Willis, J. (2018). *Education budget strategies for challenging times: How California school districts are addressing the Silent Recession*. WestEd.

<https://www.wested.org/wp-content/uploads/2018/12/Silent-Recession-II-Budget-Strategies-Report.pdf>

Krausen, K., & Willis, J. (2018). *Silent Recession: Why California school districts are underwater despite increases in funding*. WestEd. <https://www.wested.org/wp-content/uploads/2018/05/resource-silent-recession-2.pdf>

Hough, H., Willis, J., Grunow, A., Krausen, K., Kwon, S., Mulfinger, L. S., & Park, S. (2017). *Continuous improvement in practice*. Policy Analysis for California Education. <https://edpolicyinca.org/sites/default/files/C1%20in%20Pratice.pdf>

Krausen, K. (2016). *Developing district coherence: Barriers and supports* [Conference session]. American Education Research Association Conference, Washington, DC, United States.

Krausen, K. (2016). *Increasing LCAP transparency and reaffirming California’s commitment to local control: Experiences of district and county leaders*. California School Board Association. <https://goo.gl/CsvSHo>

Krausen, K., Timar, T., & Briggs, M. (2016). *Systems change: From theory to implementation*. Policy brief funded by the Stuart Foundation.

Harris, K. D., Hovis, S., Krausen, K., Chida, B., Reed, S., Wilson, A., & King, J. (2016). *In school + on track: Attorney General's 2015 report on California's elementary school truancy and absenteeism crisis*. Office of the Attorney General, Department of Justice. <http://oag.ca.gov/truancy>

Gee, K. A., & Krausen, K. (2015). Safety linked to reduced truancy in high–poverty schools. *UC Davis Center for Poverty Research Policy Brief 3(8)*.

Harris, K. D., Habig, J., Krausen, K., Woo, T., & Sumner, R. (2015). *In school + on track: Attorney General's 2015 report on California's elementary school truancy and absenteeism crisis*. Office of the Attorney General. California Department of Justice. <http://oag.ca.gov/truancy>

Krausen, K. (2015). *Defining district goals in a systems transformation collaborative: The role of leadership* [Conference session]. AERA Conference, Chicago, IL, United States.

Krausen, K. (2015). *Middle school students' expectations for college: Exploring the disconnect between students' academic achievement and college aspirations* [Conference session]. AERA Conference, Chicago, IL, United States.

Krausen, K. (2015). *The portfolio strategy: School board and district leadership, policy and politics* [Conference session]. AERA Conference, Chicago, IL, United States.

Harris, K. D., Suvor, D., Habig, J., Krausen, K., Laird, P., & Sumner, R. (2014). *In school + on track: Attorney General's 2015 report on California's elementary school truancy and absenteeism crisis*. Office of the Attorney General, Department of Justice.
<http://oag.ca.gov/truancy>

Krausen, K. (2014). *How youth perceive the importance of college: A descriptive analysis of information sources* [Conference session]. AERA Conference, Philadelphia, PA, United States.

Krausen, K. (2014). *How youth perceive the importance of college: A descriptive analysis of information sources* [Conference session]. Sociology of Education Association Conference, Pacific Grove, CA, United States.

Krausen, K. (2014). *Ongoing professional learning for superintendents: A descriptive analysis of a network approach to professional development* [Conference session]. AERA Conference, Philadelphia, PA, United States.

Harris, K. D., Nelson, B., Habig, J., Sierra, A., Beninati, N. A., Ysrael, C. Z., Krausen, K., & Lloyd, J. (2013). *In school + on track: Attorney General's 2015 report on California's elementary school truancy and absenteeism crisis*. Office of the Attorney General, Department of Justice.
<http://oag.ca.gov/truancy>

Krausen, K. (2013). *Education payment deferrals in California: The disproportionate impact on disadvantaged communities* [Conference session]. AERA Conference, San Francisco, CA, United States.

Krausen, K. (2012). *Defining national education priorities in the United States: A comparative analysis of presidential rhetoric from 1993 to 2011* [Conference session]. International Social Sciences Conference, Honolulu, HI, United States.

OTHER PROFESSIONAL EXPERIENCE

- Lecturer. EDU 292 (third-year EdD course). University of California at Davis, Davis, CA (2016–2018)
- Research Consultant. WestEd, Sacramento, CA (2016–2018)
- Research Consultant. California School Boards Association (CSBA), West Sacramento, CA (2016–2017)

- College Instructor. Prison University Project, San Quentin Prison, San Quentin, CA (2008–2013)
 - Program Director. Oakland Parents Literacy Project, Oakland, CA (2003–2006)
 - Field Director/Constituent Liaison. Oakland Unified School District, Board of Education, Oakland, CA (2001–2003)
-

SELECTED PROFESSIONAL ACTIVITIES

- Advisory Committee Member, Blueprint for Quality Schools, Oakland Unified School District (2017–2018)
 - Chair, Board of Directors, Oakland Ready to Learn (2005–2010)
 - Chair, Local Advisory Board, First Book East Bay (2004–2006)
-

PROFESSIONAL AFFILIATIONS

- California Education Lab, University of California at Davis
- UC Davis Center for Poverty Research

Lupita Alcalá

WestEd, 1000 G Street, Sacramento, CA 95814

SUMMARY OF RELATED EXPERIENCE

Lupita is a dedicated, integrity driven, and highly qualified leader with over 25 years of experience in early childhood to higher education advocacy, policy, project development, and executive leadership. Committed to addressing systemic and structural barriers to equity includes tackling complex policy and system challenges through the development of the groundbreaking 2021 Master Plan for Early Learning and Care for California’s Governor, which resulted in California’s expansion of preschool to include all 4-year-old children.

Prior to joining WestEd, Lupita served as the first Latina Chief Deputy Superintendent at the California Department of Education and was Executive Director of the California Student Aid Commission. In these roles, she worked to remove structural barriers to equity and implemented systems that expanded access and opportunity for historically underrepresented children, youth, and young adults through programs and funding.

EDUCATION

- 1999 EdM, Education, Planning and Social Policy, Harvard University, Cambridge, MA
- 1996 BA, Political Science, University of California at San Diego, La Jolla, CA
- 1996 Field Research Study, Universidad Nacional Autónoma de México, & Guadalajara, Jalisco, México

PROFESSIONAL EXPERIENCE

2020–Present

Director, Education Policy & Outcomes, Strategic Resource Allocation and Systems Planning Team
WestEd, Sacramento, CA

Lead and develop projects that influence and support the development of state and local policies that positively affect learning and outcomes from birth to career. Lead and support a range of projects that aim to inform, influence, and affect policy and system changes that improve equity, outcome, and learning opportunities for children and youth. Primary duties include leading and organizing project planning and implementation activities; managing client needs and expectations; encouraging innovation with attention to continuous improvement and performance; and contributing to the assessment and design of the California early learning,

K–12, and postsecondary education and social service care system. This is accomplished by engaging WestEd colleagues, clients, and partners in the analysis, creation, and/or implementation of state and local policies that reflect research and an understanding of effective practice.

2019–2020

**Chief Deputy Superintendent
California Department of Education, Sacramento, CA**

Responsible for providing executive-level leadership in state and federal policy development and program administration to local educational agencies, county offices of education and other stakeholders. Provided vision, leadership and direction for the development and implementation of statewide educational strategy and policies for the State Superintendent of Public Instruction's (SSPI) priorities and education initiatives, with a focus on educational policy, workforce, school finance and school and student accountability. Represented the SSPI for public speaking engagements, legislative and budget hearings, conferences and high-level meetings with the Governor's Office, California Legislature, the State Board of Education, local educational agencies, and business and community organizations statewide.

2016–2018

**Executive Director
California Student Aid Commission, Sacramento, CA**

Responsible for providing executive-level leadership and vision to a 15-member independent commission and staff to deliver the largest need-based financial aid program in the nation. Provided state and national policy leadership in collaboration with the Commission. Responsible for carrying out important political, policy, leadership, managerial, information technology, budgetary, public relations, and community affairs responsibilities, including obligations and accountability for statewide, national and international matters. Represented the Commission before the Governor, Legislature, the federal Administration, including the United States Department of Education, Congress, international consulates, higher education segments, and the public on higher education policy and financial aid issues affecting the Commission's programs, student access, affordability, and accountability.

2011–2015

**Deputy Superintendent, Instruction and Learning Branch
California Department of Education, Sacramento, CA**

Responsible for providing executive-level leadership in implementing the State Superintendent of Public Instruction's (SSPI) priorities and education initiatives and established the California Department of Education's policies and procedures. Planned, coordinated, and directed the activities of the Career and College Transition Division, Curriculum Frameworks & Instructional Resources Division, Early Education and Support Division, English Learner and Support Division, and the Professional Learning and Support Division. Provided leadership in state and federal policy development and program administration to local educational agencies, county offices of education and other stakeholders. Represented SSPI for public speaking

engagements, legislative hearings, conferences and high-level meetings with the Governor's Office, California Legislature, the State Board of Education (SBE), local educational agencies, and business and community organizations statewide. Played a key leadership role in promoting and revising policies regarding career pathways, science, technology, engineering and math, art, early education, English learners, migrant students, high risk youth, high school aged youth and adults. Served as a member of the SSPI's Executive Cabinet, is an advisor to the SSPI and Chief Deputy of Public Instruction (CDPI) about statewide education policy and provides leadership in initiating statutory changes and setting policies.

2006–2011

Deputy Superintendent of Government Affairs and Charter Development Branch (2007–2009, Director; 2006, Assistant Director)

California Department of Education, Sacramento, CA

Responsible for executive-level leadership in fiscal policy and legislative expertise within the Government Affairs and Charter Development Branch to coordinate the department's positions on fiscal and legislative issues before the State Legislature, Congress, and the Administration. Planned, directed, and coordinated the activities of over 30 staff and a budget of \$108 million. Provided guidance and support for the development and oversight of high-quality charter schools. Advisor to the SSPI and CDPI about statewide education policy and legislation.

2003–2006

Legislative Associate

California Department of Education, Sacramento, CA

Monitored, analyzed, and advocated on the most difficult and complex pieces of proposed legislation affecting K–12 education on behalf of CDE. Worked with programmatic staff and legal staff to draft proposed legislation for the CDE and SBE and Legislative Committees. Assisted the Deputy Superintendent with the State education budget, by monitoring and testifying at budget hearings. Made presentations and provided technical assistance to individual legislators, legislative staff, CDE leadership, and the SBE. Assisted and advised the Deputy in providing department-wide coordination of the legislative program. Worked with the communications unit on Spanish media interviews, translations, and representing the SSPI. Served as liaison between the CDE and the Legislature and public education organizations.

2003

Deputy Legislative Secretary

Office of Governor Gray Davis, State of California, Sacramento, CA

Advised the Governor on all K–12 and higher education legislation. Analyzed and approved legislative positions from state departments and agencies. Worked with state agencies, boards and commissions, legislators, and the education community to develop policy. Prepared confidential bill analyses and policy briefs for the Governor. Monitored and liaison to the Commission on Teacher Credentialing, California Student Aid Commission and the SBE. Work closely with press and communication units on press releases and public events. Served as a liaison to the education community.

2000–2003

Legislative Associate

California School Boards Association, Sacramento, CA

Provided in-depth political analysis and legislative advocacy on state and federal education legislation to a diverse membership and legislative members on proposed legislation, legislative issues, and policies, representing the interests of the over 1,000 school districts. Monitored the State Allocation Board, SBE, and served as an advisory committee member on the Seismic Safety Commission.

1999–2000

Legislative Analyst

California School Boards Association, Sacramento, CA

Provided in-depth analysis and evaluation of legislative and regulatory proposals and public policy issues as the liaison and manager of the Legislative Action Network (a fully integrated web-based grassroots communication and advocacy network, including organizing members as effective Governmental Relations Chairs). Researched and developed news articles, alerts, briefing papers, and fact sheets on state and federal issues for association leadership.

SELECTED PUBLICATIONS AND PRESENTATIONS

Alcalá, L. (2023). *Integrated Student Supports: Building Partnerships and Fiscal Sustainability Shared Implementation*. WestEd.

Alcalá, L. (2023). *Making Change from Where I Sit* [Keynote speaker]. CALSA Woman’s Leadership Network, Burlingame, CA, United States.

Alcalá, L. (2022). *Shared Implementation through Shared Leadership: Integrated Care Field Guide for Whole Child Comprehensive Services*. WestEd.

Alcalá, L. (2022). *Learning Session: Education. Various state agencies within the Health and Human Services* [Presentation]. WestEd, Sacramento, CA, United States.

Alcalá, L. (2020). *Summer Meals Program Episode 9* [Audio podcast]. California Department of Education. <https://www.cde.ca.gov/re/wn/rf/edtalks-ep9.asp>

Alcalá, L. (2020). *Los Programas del Servicio de Alimentos de Verano Episode 10* [Audio podcast]. California Department of Education. <https://www.cde.ca.gov/re/wn/rf/edtalks-ep10.asp>

Alcalá, L. (2019). *Student Mental Health* [Policy workgroup]. California Student Mental Wellness Conference, California Department of Education, Sacramento, CA, United States.

Alcalá, L. (2019). *California STEAM Symposium: Building Leaders in Math and Science Implementation* [Pre-conference]. California Department of Education, Anaheim Convention Center, Anaheim, CA, United States.

Alcalá, L. (2019). *California's Commitment to Improving Educational Opportunities and Outcomes for English Learners* [Keynote address]. Consortium for English Learner Success Convening, Los Angeles, CA, United States.

Alcalá, L. (2019). *Caminos Week* [Keynote]. California State University Long Beach, Latinx Education, Long Beach, CA, United States.

Alcalá, L. (2019). *Outlining a New Vision for California Department of Education* [Presentation]. Association of California School Administrators Superintendents Symposium, Monterey, CA, United States.

Alcalá, L. (2019). *Perspectives from Leaders in California's Public Educational Institutions* [Lunch panel]. Policy Analysis for California Education Convening, University of California Berkeley, Berkeley, CA, United States.

Alcalá, L. (2019). *Welcome from Riverside COE, California Student Aid Commission, CDE, and The Education Trust-West* [Keynote]. The California College Affordability Summit: A K-12 Pathway to Financial Aid, Indian Wells, CA, United States.

PROFESSIONAL APPOINTMENTS

- Member, Advisory Board, California Policy Lab (2021–Present)
- Member, Inside California Education (2014–Present)
- Member (Advisory Group), PPIC (Early Childhood CCDF Grant) (2022–2023)
- Member (SSPI Representative), California Collaborative for Educational Excellence (2019–2020)
- Board of Directors, WestEd (2019–2020)
- Member (Represented the State Superintendent of Public Instruction), Puente Advisory Board (2015–2020)
- Chair and Member, Public Member (Represented the State Superintendent of Public Instruction), Commission on the Status of Women and Girls (2010–2019)
- Board of Director (Represented the State Superintendent of Public Instruction), Linked Learning Alliance (2012–2015)
- Member (Represented the State Superintendent of Public Instruction), California Education Roundtable, Intersegmental Coordinating Committee (2011–2015)
- Member (Represented the State Superintendent of Public Instruction), California Subject Matter Project Concurrence Committee (2011–2015)
- Member (Represented the State Superintendent of Public Instruction), California Workforce Investment Board (2011–2014)

STATE LEADERSHIP

- WestEd: Led the 2025 WestEd Whole Child priority area workgroup and co-led the Reciprocal Mentor Pilot Program Community of Practice. Served as author and senior advisor on the School Based Mental Health Report. Co-led the development and co-authored the Master Plan for Early Learning and Care for Governor Newsom and his cabinet. An actionable roadmap for California’s Early Childhood Education System including finance, governance, facilities, access, quality and universal preschool.
- CA Student Aid Commission: Prominent voice and leader in statewide policies on college cost and financial aid reform. Initiated and secured funding for the Expanding Opportunities, Reducing Debt Financial Aid Report, SEARS survey, new Grant Delivery System and website, increased K–12 & Higher Education counselor outreach and Cash for College events.
- California Department of Education: Key Leadership in promoting State Superintendent key initiatives: Early Education and Care, College Access, Opportunity and Affordability, Closing the Achievement Gap, Literacy, Diverse Teacher Pipeline and Workforce Development & Jobs for the Future:
 - Career and College Transitions Division - Directed and oversaw \$500 million Career Pathways Trust Grants, \$30 million California Partnership Academies, and currently, \$900 million CTE Incentive Grant
 - Curriculum Frameworks & Instructional Resources Division - Directed and oversaw development of standards, framework and instructional material adoption for English Language Arts, Mathematics, English Language Development, Next Generation Science Standards, and History Social Science
 - Early Education and Support Division - Directed and oversaw \$75 million Race to the Top Early Learning Grant to develop a Quality Rating and Improvement System and \$4.4 million annually for the federal Early Head Start Program
 - English Learner and Support Division - Created the English Learner and Support Division, developed ELD standards, and 1st in the nation Seal of Biliteracy
 - Professional Learning and Support Division - Directed and oversaw the development of 13 professional learning modules, instituted the first STEM office at CDE and directed and oversaw the first annual CA STEM Symposium (2013–2015)

Joanna Mathias

WestEd, 730 Harrison St, San Francisco, CA 94107

SUMMARY OF RELATED EXPERIENCE

Dr. Joanna Mathias is a Senior Research Associate with the Strategic Resource Allocation and Systems Planning Team at WestEd where her projects include analyses of early college and college promise programs, the effect of school finance reform in California on student achievement and the equity impacts of fiscal autonomy for schools, as well as data analysis to support community college master planning. She is an experienced policy researcher with expertise in the economics of education, education policy, and econometrics, in particular, leveraging quasiexperimental econometric methods on large institutional and administrative data sets for causal inference.

She works in partnership with state and local education agencies, advocacy groups, and with private funders to answer pressing questions on access to educational opportunities and the impacts of educational policy in various contexts. She has presented her work at the Association for Education and Finance Policy Annual Conference, and both the American and California Education Research Association Annual Conferences. She received the CERA 2021 Outstanding Paper Award for her work on access to dual enrollment. She has also published policy briefs and technical reports through UC Davis' Wheelhouse and Stanford University's Policy Analysis for California Education (PACE).

As a first-generation college student and community college alumna, Dr. Mathias is broadly interested in the role of education in intergenerational social mobility, with an emphasis on postsecondary transitions. Her recent work has focused on the college & career readiness space, particularly on access and equity in career and technical education and dual enrollment, in addition to college & career readiness in accountability systems. Dr. Mathias holds a PhD in School Organization & Education Policy from the University of California at Davis, and an MS in Economics from North Carolina State University.

EDUCATION

- 2022 PhD, Education, School Organization & Education Policy, University of California, Davis, CA
- 2013 MA, Economics, North Carolina State University, Raleigh, NC
- 2011 BA, Economics, University of Colorado, Colorado Springs, CO

PROFESSIONAL EXPERIENCE

2021–Present

Senior Research Associate – Econometrics & School Policy, Strategic Resource Allocation and Systems Planning Team, WestEd, San Francisco, CA

Builds, maintains, merges and manages large datasets; effectively summarizes descriptive data, and leads statistical analyses using advanced statistical methods. Leads the conceptualization and writing of reports and proposals; prepares descriptive reports, analytic sections, and evaluation reports and proposals; leads in the preparation and submission of large and small proposals. Facilitates meetings and presents research findings. Interfaces with clients and lay persons related to data collection, analyses, and findings

2017–2021

**Graduate Student Researcher
California Education Lab at University of California, Davis CA**

Collaborated with faculty & researchers on grant-funded research projects focusing on career and technical education, dual enrollment, and Cal grants. Consulted with research partners at the California Department of Education and California Community College Chancellor’s Office. Cleaned & analyzed data. Wrote policy briefs & literature reviews. Developed presentations.

2021

**Consultant
GradPathways Institute, University of California, Davis CA**

Conducted focus groups for microcredential pilot. Identified career pathways of highest interest and need for early-stage development as microcredential pathways. Developed professional development programming aligned to pathways for microcredentials.

2015–2020

**Teaching Assistant
University of California, Davis, CA**

Lectured, held office hours, evaluated assignments and examinations, developed assignments and rubrics. Reviewed course design and materials for universal design principles.

RECENT PROJECTS AND GRANTS

Dual Enrollment Research Fund (\$156,000)

Co-Principal Investigator. Conducting quantitative research in California and Florida to investigate how academic achievement influences who participates in dual enrollment and the impacts of dual enrollment course performance using a statistical matching design.

State of Nevada Change Management Plan for Funding Formula (\$1.1m)

Quantitative Researcher. Analyzing changes in per pupil funding and outcomes with the implementation of a new funding model. Quasiexperimental analysis of the impact of the new funding model on outcomes using a synthetic control design.

Independent Evaluation of the Technical Assistance Provided to Local Educational Agencies (\$100,000)

Co-Principal Investigator. A quasiexperimental analysis of differentiated assistance leveraging a regression discontinuity in California's School Dashboard accountability system.

CSU Transfer Pathways Study (\$250,000)

Lead Quantitative Researcher. Conducting survey data collection and administrative data analysis to support Bay Area California State Universities and community colleges to improve transfer student experiences and re-engage stopped out students.

College Promise Community of Practice, Kresge Foundation (\$200,000)

Lead Researcher. Lead analysis of data on California community colleges' College Promise program characteristics including enrollments, eligibility requirements, and financial resource development and use to develop an emerging framework for understanding California College Promise funding models and understand the relationship between funding models, program features, and equity.

AccelerateEd & Massachusetts Alliance for Early College

Principal Investigator. Early College Program Cost Modeling & Technical Assistance.

Napa Valley College Educational Master Plan

Lead Quantitative Researcher. Lead data analyst in collecting and presenting environmental scan and institutional administrative data to college partners to support master planning process.

College of the Desert Strategic Educational Master Plan

Lead Quantitative Researcher. Lead data analyst in collecting and presenting environmental scan and institutional administrative data to college partners to support master planning process.

Peralta Community College District Educational Master Plan

Lead Quantitative Researcher. Lead data analyst in collecting and presenting environmental scan and institutional administrative data to college partners to support master planning process.

Evaluation of California's Differentiated Assistance (\$400,000)

Quantitative Researcher. Led collection and analysis of school data for regression discontinuity analysis of the California school accountability system.

SELECTED PUBLICATIONS AND PRESENTATIONS

Rauner, M., Mathias, J., Lolashvili, G. (2024). [*Sustainable, Robust, and Inclusive College Promise Programs in California's Community Colleges: Examining the Relationship Between Funding Models and Equity*](#). College Promise Project. WestEd.

Mathias, J. Hart, B. Lolashvili, G., McGee, J., McClellan, P. Durodoye, R., Le Fevre, L. (2024). *Transfer Student Pathways Research: Final Report*. WestEd.

Mathias, J. Hart, B. Lolashvili, G., McGee, J., McClellan, P. Durodoye, R., Le Fevre, L. (2024). *Transfer Student Pathways: Information, Support, and Student Experiences*. Brief. WestEd.

Krausen, K., Tanner, S., Caparas, R., Makkonen, R., Burr, E., & Mathias, J. (2022). [*Evaluation of California's Differentiated Assistance*](#). WestEd.

Mathias, J. (2022). *Dual Enrollment and Career and Technical Education in California: Participation, Access, and College and Career Readiness under Common Core and Multiple Measures Accountability*. Unpublished doctoral dissertation, University of California, Davis. Davis, CA.

Mathias, J. (2022, April). *Dual Enrollment: How Opportunity and Participation is Distributed across Schools*, Paper presented to the American Educational Research Association Annual Conference, San Diego, CA.

Kurlaender, M., Reed, S., Grosz, M., & Mathias, J., & Hughes, K. (2021). [*A Foot in the Door: Growth in Participation and Equity in Dual Enrollment in California*](#). Research Brief, Davis, CA: Wheelhouse: The Center for Community College Leadership and Research.

Mathias, J. (2021, November). *Career and Technical Education Re-Branded: A New Pattern of Stratification by CTE Industry Groups*, Presentation at the California Educational Research Association Annual Conference, Anaheim, CA.

Mathias, J. (2021, November). *Dual Enrollment: How Opportunity and Participation is Distributed across Schools*, Paper presented to the California Educational Research Association Annual Conference, Anaheim, CA.

Kurlaender, M., Isler, J., Reed, S., Asim, M., Hurtt, A., & Mathias, J. (2018). *Academic Rigor in 12th Grade Course Enrollment*, Presentation at the California Educational Research Association Annual Conference, Anaheim, CA.

Reed, S., Dougherty, S. M., Kurlaender, M., & Mathias, J. (2018). [*A Portrait of California Career Technical Education Pathway Completers*](#). Technical Report, (*Getting Down to Facts II*) Palo Alto, CA: Stanford University and Policy Analysis for California Education (PACE).

AWARDS

Outstanding Paper Award. (2021). Dual Enrollment: How Opportunity and Participation is Distributed across Schools, California Educational Research Association Annual Conference

SELECTED PROFESSIONAL ACTIVITIES

- Board Member, Chancellor's Graduate and Professional Student Advisory Board, UC Davis (2020–2021)
 - Co-Chair, Graduate Student Association, School of Education, UC Davis (2019–2021)
-

PROFESSIONAL AFFILIATIONS

- American Educational Research Association
- California Educational Research Association
- Association for Public Policy Analysis and Management
- Society for Research on Educational Effectiveness
- Association for Education Finance and Policy

Ryan Charles Miskell, PhD

WestEd, 730 Harrison Street, San Francisco, California 94107

SUMMARY OF RELATED EXPERIENCE

Dr. Ryan Miskell is a Senior Research Associate at WestEd whose management, evaluative, and improvement work has encompassed a variety of evaluation designs and content areas, including charter and magnet schools, equity, family engagement, literacy, school climate and safety, and teacher preparation. Miskell's experience teaching elementary school, middle school, English learners, and graduate students informed his commitment to assisting communities and school systems that work to build meaningful partnerships and relationships.

Miskell is the lead evaluator for the Massachusetts Statewide Family Engagement Center and for Northwest Florida State College's Title III Grant. In his 15 years of experience in the education field, Miskell has served as a classroom teacher and teacher leader, conducted field research in over one-hundred traditional public and public charter schools, provided teacher coaching and support, evaluated school-, district-, and state-level policies and programs, and engaged stakeholders in school and program improvement efforts. He has collaborated with several State Education Agencies to evaluate programs and policies, including California, Colorado, Delaware, Maryland, Massachusetts, New Jersey, Oklahoma, Pennsylvania, Texas, and Washington, DC. Miskell received the 2014 Oklahoma Education Association Friend of Education Award for his contributions to the betterment of public education through an evaluation of the State's school accountability policy. Prior to joining WestEd in 2015, Miskell was a Post-Doctoral Fellow with the Oklahoma Center for Education Policy and a teacher with Tulsa Public Schools in Oklahoma. Miskell holds teacher certifications for secondary language arts and English language learner specialist and principal certifications for secondary education and common core.

EDUCATION

- 2014 PhD, Education Leadership and Policy Studies; University of Oklahoma, Tulsa, OK
- 2011 MEd, Education Administration, Curriculum, and Supervision; University of Oklahoma, Tulsa, OK
- 2009 BA, Political Science, American University, Washington, District of Columbia

PROFESSIONAL EXPERIENCE

2015-Present

Senior Research Associate, WestEd, Washington, DC

Serves as Lead Evaluator and Researcher for studies funded by private foundations, United States Department of Education, National Science Foundation, state departments of education, and local education agencies.

2014-2015

Post-Doctoral Fellow, Oklahoma Center for Education Policy, University of Oklahoma, Tulsa, OK

Coordinated data collection, data entry, data analysis, and generated reports to assess, report, and present on the effectiveness of school health conditions. Contributed research and analysis toward three reviews of state-level school accountability policies.

2009-2015

Language Arts Teacher and English Language Learner Specialist, Tulsa Public Schools, Tulsa, OK

Planned and taught units of study for English Language Learner students in kindergarten through sixth grade; taught seventh grade language arts. Planned and led professional development for a staff of twenty teachers to build school capacity in culturally relevant teaching practices. Established a reading buddies program to connect members of a church with middle school students through shared reading and relationship building sessions. Named McLain Junior High School Teacher of the Year in 2012.

SELECTED PUBLICATIONS

Friedrich, L., Awadalla, A., Krishnan, J., Miskell, R. C., Sayers, R. (2025). Adolescent Literacy Framework. Oregon Department of Education.

Miskell, R. C., Ciancio, D., Gu, J., & Erby, L. (2024). Newsela's Impact on Social Studies Instruction: A Study in the Red Clay School District (report for Newsela). WestEd.

Terrell, J. H., Henrich, C. C., Miskell, R. C., Nabors, A., & Grogan, K. (2024). Measuring school climate as a component of school capacity. *Contemporary School Psychology*, 1-13.

Miskell, R. C., Heredia, A., & Miller, S. (2024). Florida Department of Education: Charter Schools Program Monitoring Report (report for the Office of Innovation and Improvement). WestEd.

Miskell, R. C., & Cannon, M. (2024). Fortune School of Education: Charter Schools Program Monitoring Report (report for the Office of Innovation and Improvement). WestEd.

Janulis, E., Miskell, R. C., & Szendey, O. (2024). California Department of Education: Charter Schools Program Monitoring Report (report for the Office of Innovation and Improvement). WestEd.

Bugler, D., Gibney, T., Maberry, S., Miskell, R. C., Vaughn, C., Koumoutsakis, T., Quarles, B., Roldan-Rueda, D., & Williams, T. (2024). Evaluation of the Invest in Kids Act: Final Report. WestEd.

Ruffini, S., Miskell, R. C., & Allender, S. (2024). Baltimore County Public Schools Magnet School Assistance Program Grant Evaluation: 2024 Summative Report. WestEd.

Grogan, K., Nabors, A., Chow, A., & Sayers, R., & Miskell, R. C. (2024). Independent Evaluation of the Colorado READ Act: Per-Pupil Funding Year 4 Summary Report. WestEd.

Brianne Dotson

WestEd, 730 Harrison Street, San Francisco, CA 94107

SUMMARY OF RELATED EXPERIENCE

Dr. Brianne Dotson is a Systems Change Senior Program Associate with the Strategic Resource Allocation and Systems Planning Team at WestEd. Dr. Dotson provides technical assistance to state and local educational leaders within the K–12 education system to improve equitable student learning experiences, opportunities, and outcomes. Areas of focus include facilitating systems change through organizational capacity building and reviewing how resources are directed toward students with high needs.

EDUCATION

- 2023 EdD, Educational Leadership, Michigan State University, East Lansing, MI
2005 EdM, Education Policy and Management, Harvard University, Cambridge, MA
2001 BA, Communication, University of Southern California, Los Angeles, CA

PROFESSIONAL EXPERIENCE

2022–Present

Senior Systems Change Program Associate, Strategic Resource Allocation and Systems Planning Team
WestEd, San Francisco, CA

Facilitates systems change efforts with education leaders, including strategic planning, stakeholder engagement, and networked learning, to address systemic equity challenges in school districts, county offices of education, and state education agencies.

2022

Graduate Assistant
SLIDE: School Leaders for Diversity and Equity, East Lansing, MI

Prepared learning materials to support district leaders in using data and racial equity frameworks to clearly articulate district visions and aligned action plans. Co-facilitated collaboration amongst colleagues in job-alike roles to build an infrastructure that creates racial equity experts and teams throughout participants' district.

2021–2022

Superintendent Residency

Chelsea School District/Michigan State University, Chelsea, MI

Engaged in strategic planning with district leadership team in service of district goals. Designed and led comprehensive analysis of summer school impact on student learning. Outcomes informed district's ESSER fund strategy. Participated in district policy revision processes.

2020–2022

Founder and Managing Consultant

BMD Education Consulting Group, Ann Arbor, MI

Coached and supported principals in reinventing their schools as innovative, equity-focused learning spaces for all students. Led school teams through school improvement processes. Supported faculty with grant and commendation applications.

2016–2020

Director of Organizational Impact

TeachingWorks, University of Michigan, Ann Arbor, MI

Led efforts to define and measure impact and outcomes across programs. Measured efforts to influence the public and policy discourses about teaching, its importance for young people, and its centrality to the pursuit of social justice. Led efforts to synthesize and analyze data. Developed honest and compelling stories about the organization's impact.

2015–2016

Strategic Consulting Program Director

Leading Educators, Nationwide

Designed and directed leadership programming and coaching efforts to support school districts and charter management organizations in reaching student achievement goals. Established and maintained effective partnerships to accomplish goals. Increased performance of mentors via leadership and instructional coaching and development.

2014–2015

Consultant

The Chicago Public Education Fund, Chicago, IL

Conducted rigorous due diligence for investment recommendations. Managed and executed investments for effective principal recruitment and development. Authored analytical reports based on data-driven research.

2012–2014

Principal

Bronzeville Lighthouse Charter School, Chicago, IL

Managed \$4.3 million annual budget, 45 staff members and 480 K–8 students. Achieved ambitious student achievement results: increased student performance to 132 percent and 154 percent growth in reading and math on NWEA (highest growth in LHA network of 21 schools). Doubled community partnerships and extracurricular programming.

2010–2012

Assistant Principal

KIPP Spirit College Prep, Houston, TX

Led faculty to achieve high performance through goal setting, coaching and evaluation. One of eight Assistant Principals accepted into national KIPP School Leadership Program. Facilitated regional and school-based professional development sessions for teachers.

2009–2010

Program Director

Teach For America, Houston, TX

Managed 36 first and second year teachers placed in 12 schools and two districts. Increased teacher effectiveness via coaching and professional development (81 percent of teachers made notable student achievement gains). Systematized collaboration of teacher support with school leaders and instructional coaches.

2008–2010

Consultant

New Leaders for New Schools, Nationwide

Increased application conversion rate by 44 percent for principal candidates. Leveraged relationships with key stakeholders to design and implement an effective strategy to accomplish goals.

2005–2006

Private Family Home School Teacher

Burlington, VT

Designed and delivered global learning experiences in accordance with the Vermont state education framework standards to support student learning in 25 countries. Students achieved mastery assessment levels based on student achievement data analysis.

2002–2004

Teacher

Davis Middle School/Teach for America, Compton, CA

Selected from an applicant pool of over 14,000 top recent college graduates. Achieved 80 percent proficiency for year-end student reading and writing assessment scores. Served on Leadership Team as best practice facilitator for grade level teams.

Tab 3: References (Appendix C)

Appendix C - References

Client Name	Jackson Public Schools
Contact Name and Title	Earl Burke, Chief Operations Officer
Contact Address	662 S. President Street, Jackson MS 39201
Contact Telephone Number	601.960.881
Email Address	eburke@jackson.k12.ms.us
Type of work provided to the client	Fiscal analysis and multi-year strategic planning
Effective contract dates for the time frame services were/are being provided to client	1/22/2022 - 12/31/2022

Client Name	Delaware Department of Education
Contact Name and Title	Christopher Lehman, Education Associate
Contact Address	35 Commerce Way, Dover, DE 19904
Contact Telephone Number	302.857.3394
Email Address	christopher.lehman@doe.k12.de.us
Type of work provided to the client	Collaborated with Delaware Department of Education offices to establish a framework for family engagement in education.
Effective contract dates for the time frame services were/are being provided to client	2020-2021

Client Name	Nevada Department of Education, Student Investment Division
Contact Name and Title	Megan Peterson, Deputy Superintendent
Contact Address	2080 E. Flamingo Road, Ste. 210, Las Vegas, NV 89119
Contact Telephone Number	775.687.9489
Email Address	megan.peterson@doe.nv.gov
Type of work provided to the client	Supported NDE with a change management plan for their revised K-12 funding formula and are currently supporting the Commission on School funding in development of a new reporting framework to assess impact of new funding formula.
Effective contract dates for the time frame services were/are being provided to client	8/8/2023-12/30/2024 5/14/2024-6/30/2025

Component 3: Cost Data/Budget (Appendix I)

Tab 4: Cost Data/Budget

WestEd offers a total fixed price of \$354,100. The proposed pricing is detailed in Table 2 of Appendix I, and is inclusive of all costs entailed in providing the services described in the proposal for the period beginning March 2, 2025, and ending February 27, 2026. WestEd can provide additional details regarding our budget upon request.

All pricing and costs are guaranteed for 180 days after the proposal due date or until the contract is executed, whichever comes first.

Component 4: Other

Tab 5: Additional Relevant Information

Track Record and History of Successfully Completed Projects. WestEd efficiently manages an active portfolio of 450 to 700 contracts and grants annually by continuously enhancing our project management capabilities through strategic staffing and system improvements. The following sections provide details on a selection of recent, relevant projects WestEd has led. See Tab 3: Reference for our completed Appendix C-References form.

Below are more detailed descriptions of the provided references.

- **Jackson Public Schools:** WestEd partnered with Jackson Public Schools (JPS) to create a sustainable and equitable roadmap for Elementary and Secondary School Emergency Relief (ESSER) funding over the next three to five years. This initiative involved conducting a needs and assets assessment, along with multiple rounds of stakeholder engagement to guide strategic resource recommendations that align with the district’s strategic plan. Additionally, the WestEd team performed a comprehensive fiscal health analysis and supported the implementation of fiscal health recommendations to establish sustainable budgeting practices, which will facilitate future strategic resource investments. WestEd delivered a series of presentations, memos, and reports outlining our findings and recommendations, culminating in the final ESSER “roadmap” intended for both internal and external stakeholders of JPS.
- **Delaware Department of Education:** WestEd partnered with the Delaware Department of Education (DDOE) to create a framework for family engagement aimed at enhancing the capacity of both DDOE and schools over three years. To support this goal, the WestEd team delivered actionable and timely information through eight practical digests focused on engaging families, which were distributed monthly from October 2021 to June 2022. The content of these digests emphasized best practices that are responsive, timely, and beneficial for all schools, including Comprehensive Support and Improvement (CSI) and Targeted Support and Improvement (TSI) schools, with particular attention given to serving vulnerable populations. These digests were subsequently compiled into a comprehensive family engagement guidance document.
- **Nevada Department of Education:** In 2019, the Nevada Department of Education (NDE) implemented a weighted student funding formula. However, as of 2023, it had not fully aligned its processes, laws, and policies to reflect the updates in allocation and reporting procedures associated with this new method. WestEd and its subcontractor APA conducted a review of relevant documentation—including laws, policies, and regulations—as well as processes such as reporting requirements, job responsibilities, and workflows to provide recommendations for improvement. This was accomplished

through a series of interviews and focus groups involving NDE staff, state executives, and leaders from LEAs. The final deliverable was a "change management plan" that included recommendations from the reviews along with strategies for stakeholder engagement and communication regarding future changes within a continuous improvement framework. This initiative began in August 2023 and concluded in December 2024. Additionally, from May 2024 through June 2025, WestEd is assisting NDE and the Commission on School Funding in developing a new reporting framework aimed at evaluating the impact of their updated funding formula on student outcomes and school performance.

In addition, our team has extensive experience providing research support and technical assistance to other state education agencies, school districts, and higher education institutions to ensure that the strategic planning process is actionable and impactful. The following is a sample of additional relevant projects that WestEd has led.

- **California Statewide System of Support Design and Implementation (2017–2019).** As part of WestEd’s federal grant to host the California Comprehensive Center, WestEd staff partnered with the California Department of Education and State Board of Education to develop and refine the statewide system of support for school districts and charter schools—a key component of the state’s K–12 accountability system. WestEd’s support included convening leaders from state, regional, and local education agencies, as well as representatives from education associations, advocacy groups, and other constituencies. The goal of this group was to collaboratively refine the state’s system of support, ensuring clear roles, communication structures between different agencies and levels of the system, and opportunities for input from the field. WestEd staff provided facilitation, documentation, research/information synthesis, coordination, and other support for the workgroup.
- **California Master Plan for Early Learning and Care (2019–2021).** The Master Plan for Early Learning and Care (MPELC) for California Initiative provided research and project management to assist the California Health and Human Services (CHHS) Agency in developing a MPELC. The MPELC included a series of studies to help guide the implementation of a well-aligned, comprehensive state early learning and care system. The MPELC also included actionable recommendations for advancing progress toward achieving the long-term goals of universal preschool in California and an improved quality of and access to childcare and systems of services that support children’s health development.
- **Rhode Island Equitable K–12 Reopening Strategic Planning Support (2021–2023).** WestEd supported the Rhode Island Department of Education (RIDE) in its K–12 reopening and strategic resource planning efforts. This work included an equity review to understand the disproportionate impact of the COVID-19 pandemic on vulnerable student populations, including a review of current resource allocation practices to

formulate an equity action plan to target investments and programming to meet critical learning and well-being needs. The project also included identifying a suite of district reopening metrics and publicly reporting and monitoring these metrics in a dashboard.

- **Pine Bluff Unified School District Strategic Planning (2021–2022).** WestEd was hired by the Arkansas Department of Elementary and Secondary Education in 2020 to support consolidations between the Pine Bluff School District (PBSD) and the Dollarway School District (DSD), while PBSD was under state control due to fiscal insolvency. After successfully facilitating this process, WestEd was hired by PBSD to capitalize on recent improvements, structural changes, and the widespread community commitment to revitalization to develop a strategic plan. The strategic planning process enabled PBSD to approach this unique moment of opportunity with a bold vision, ambitious goals centered on the instructional core, engaged community partners, and a thoughtful action plan. WestEd supported leadership teams to develop their strategic plan by providing transparent, well-documented processes and protocols, supporting frequent public communication, and facilitating consistent community engagement. The PBSD strategic planning process now serves as a model for collaborative planning for the Jefferson County community and many other districts in the state of Arkansas.
- **LEA Blueprint Support to the Maryland Accountability & Implementation Board (2024–2025).** In partnership with the Maryland Accountability and Implementation Board (AIB), WestEd is supporting Baltimore County Public Schools, Caroline County Public Schools, Howard County Public School System, and Prince George’s County Public Schools to align their resource allocation strategies with the Blueprint for Maryland’s Future. WestEd is supporting these four districts in re-thinking the allocation of staff and dollars in ways that meet state requirements and strategically address district priorities in a changing landscape. Additionally, WestEd is working with these districts to communicate about these changes internally, with their school boards, with their county governments, and with their communities.

**Tab 6: Signed Acknowledgement of Amendments
(Appendix E)**



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

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The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.


boxSIGN 4Q8RP7LZ-4P8ZP3RP

Authorized Signature

Jan 29, 2025

Date

Irene Wan
Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) “Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.”

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6**: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.


box SIGN 4Q8RP7LZ-4P8ZP3RP

Authorized Signature

Irene Wan

Printed Name

Jan 29, 2025

Date

Appendices

Appendix F: Assurances and Certification

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror's proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Irene Wan

Title: Manager, Proposal Coordination & Support

Signature: 
box SIGN 4Q8RP7LZ-4P8ZP3RP

Date: Jan 29, 2025

Appendix G: Release of Proposal as Public Record

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. *An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.*

Choose one:

____ Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

X Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H: Contracts

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor's current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror's proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	N/A
Contract Service	N/A
Contract Amount	\$ N/A
Contract Dates of Service	N/A

Program Office Name	N/A
Contract Service	N/A
Contract Amount	\$ N/A
Contract Dates of Service	N/A

Appendix I: Cost Data/Budget

Table 2. Proposed Project Pricing

Account	Task 1: Project Work Plan	Task 2: SWOT Analysis and Environmen tal Scan Report	Task 3: Stakeholder Engagement Plan	Task 4: Draft Strategic Plan and Performanc e Scorecard	Task 5: Final Strategic Plan and Performanc e Scorecard	Task 6: Final Presentation and Training	Task 7: Implementa tion Roadmap	Task 8: Monitoring and Reporting Protocols	MS SBE Strategic Planning and Performance Scorecard Total
Salaries	12,933.65	36,300.33	26,463.50	29,393.01	13,492.09	20,303.63	20,754.29	12,153.12	171,793.61
Benefits	4,871.96	13,673.94	9,968.52	11,072.03	5,082.32	7,648.16	7,817.92	4,577.95	64,712.80
Travel	0.00	0.00	7,666.00	0.00	0.00	3,833.00	0.00	0.00	11,499.00
Consultant / Other Personnel/Participant Support	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Telephone	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Copying and Shared Equipment	24.99	80.27	44.20	51.34	24.48	35.63	38.30	24.26	323.46
Outside Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Educational Fees	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Office Supplies and Expenses	10.29	33.05	18.20	21.14	10.08	14.67	15.77	19.10	142.31

Account	Task 1: Project Work Plan	Task 2: SWOT Analysis and Environmen tal Scan Report	Task 3: Stakeholder Engagement Plan	Task 4: Draft Strategic Plan and Performanc e Scorecard	Task 5: Final Strategic Plan and Performanc e Scorecard	Task 6: Final Presentation and Training	Task 7: Implementa tion Roadmap	Task 8: Monitoring and Reporting Protocols	MS SBE Strategic Planning and Performance Scorecard Total
Information Systems	1,280.37	4,112.43	2,264.60	2,630.42	1,254.24	1,825.62	1,962.15	1,242.92	16,572.73
Facility	605.64	1,945.26	1,071.20	1,244.24	593.28	863.55	928.13	587.92	7,839.23
Subcontracts	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<u>Program Support</u>	1,752.24	5,628.03	3,099.20	3,599.84	1,716.48	2,498.43	2,685.28	1,700.98	22,680.48
Total Direct Costs	21,479.14	61,773.30	50,595.42	48,012.02	22,172.98	37,022.69	34,201.83	20,306.25	295,563.62
<u>Indirect Costs</u>	3,028.56	8,710.04	7,133.95	6,769.69	3,126.39	5,220.20	4,822.46	2,863.18	41,674.47
Total Direct and Indirect Costs	24,507.70	70,483.33	57,729.37	54,781.71	25,299.37	42,242.89	39,024.29	23,169.43	337,238.10
<u>Management Fee</u>	1,225.39	3,524.17	2,886.47	2,739.09	1,264.97	2,112.14	1,951.21	1,158.47	16,861.90
Total Task Costs	25,733.09	74,007.50	60,615.84	57,520.80	26,564.33	44,355.03	40,975.50	24,327.91	354,100.00

Minimum Qualifications Attachments

- a. Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.
- b. See **page 19** for the age of the Offeror's business and the average number of employees for the past five (5) years.
- c. Offerors must list their principals, parent organizations, and subsidiary organizations in their proposal or qualification. Principals shall include the founder, investors, owner, co-owners, CEO, Chief, and all executive-level employees.

January 29, 2025

RE: WestEd -- Government Agency Exemption from Business Registration

To Whom It May Concern:

We are providing additional information regarding the business registration requirement in the RFP. The Mississippi Secretary of State has advised that WestEd is exempt from registration based on Mississippi statutes and federal law.

WestEd is a Joint Powers Agency (JPA) governed by public entities in Arizona, California, Nevada, and Utah, with Board members representing agencies from these states and nationally. Based on previous communications, the Mississippi Secretary of State has affirmed that, as a JPA, WestEd does not have an obligation to register as a business in Mississippi. Mississippi Code § 79-4-15.01 applies to corporations, associations, and partnerships – Joint Powers Agencies are distinct from those business entity types and are thereby not obligated to register.

As reflected by our California public agency filing (Exhibit A), joint powers agency agreement (Exhibit B), and IRS Determination letter (Exhibit C), we are a public agency rather than a "foreign entity" or "corporation." Our governing board is comprised of public agencies that jointly organized to engage in coordinated and cooperative efforts to develop fundamental, significant improvements in education. As a public agency, we do not have corporate stock, shareholders, or partners. The services we provide have been deemed essential governmental services by the IRS rather than the conduct of "business." (See, IRS Determination letter attached). Pursuant to Article 4 of the U.S. Constitution (full faith and credit clause), our status as a multistate public agency is applicable in Mississippi and other states.

We could not find any contrary Mississippi law requiring public agencies to file with the Secretary of State. However, we are more than happy to take whatever steps are needed provided that we do not misrepresent the type of agency that we are or contradict the governmental services that we provide.

Please let me know if you have any questions or if I can provide any further information.

Best,



Marion McWilliams

Exhibit B

WestEd

JOINT POWERS AGREEMENT

December 1, 1995

JOINT POWERS AGREEMENT

Establishing Joint Powers Agency

WestEd

THIS AGREEMENT is entered into pursuant to the provisions of Title 1, Division 7, Chapter 5, Article I of the California Government Code (the Joint Powers Act) and provides for the joint exercise of powers between Far West Laboratory for Educational Research and Development ("FWL") and Southwest Regional Laboratory for Educational Research and Development ("SWRL"):

WITNESSETH:

WHEREAS, the parties hereto, FWL and SWRL, find and determine that it is to the mutual benefit of the parties and in the best public interest that said parties, both defined as public entities under the Joint Powers Act, join together to establish a Joint Powers Act Agency to accomplish the purposes hereinafter set forth; and

WHEREAS,, the parties hereto, FWL and SWRL, find and determine that more effective services can be provided while improving efficiencies in operations and eliminating duplication of effort by joining together to conduct operations under the auspices of a new Agency; and

WHEREAS, the parties hereto, FWL and SWRL, find and determine that each party holds title to certain real property that is subject to grant conditions running to the respective party and it is desirable for each party to retain title to such property but to cooperate in the management of such real property; and

WHEREAS, the parties hereto, FWL and SWRL, find and determine that there remains a need to develop fundamental, significant improvements in education and to conduct educational research in order to solve the problems and to serve the needs of the public and private schools, colleges and universities of Arizona, California, Nevada and Utah; and

WHEREAS, the parties hereto, FWL and SWRL, have found that significant, fundamental improvements in education in Arizona, California, Nevada and Utah require thorough and complete planning and concentrated effort by the total community, including parents, local school board members, and the scientific, cultural, industrial sectors, as well as by the professional educators in schools, colleges, and universities; and

WHEREAS, the coordinating and cooperative efforts required of the public and private educational and research agencies are of such a magnitude that it is necessary for the parties to join together to establish an agency to be known as WestEd in order to accomplish the purposes set forth herein;

NOW, THEREFORE, the parties mutually agree as follows:

ARTICLE 1. TERMS OF AGREEMENT.

This Agreement shall be effective December 1, 1995 upon the execution hereof by FWL and SWRL, as attested by the signatures of execution on the final page hereof, and shall continue in effect until terminated as provided herein.

ARTICLE 2. NAME OF AGENCY.

FWL and SWRL hereby agree that a public agency, wholly separate and apart from FWL and SWRL, be and is hereby created under the aforesaid provisions of law, and shall hereafter be designated as "WestEd" and hereinafter referred to as "Agency,"

ARTICLE 3. CONTROL OF AGENCY.

The Agency shall be under the control of a Board of Directors, hereinafter referred to as the "Board,," who shall be the designated board members of FWL and SWRL and such additional members as may be appointed by the Board.

ARTICLE 4. NOTICES.

The Board, by resolution, shall designate a specific location at which it will receive notices, correspondence and other communications, and shall designate an officer for the purpose of receiving service on behalf of the Agency,

ARTICLE 5. MEETINGS.

The Board may hold special meetings as it may determine and shall hold regular meetings at least once every three months, The date, hour and place for each such regular meeting shall be fixed annually by resolution of said Board, which resolution shall be publicly posted for two weeks on the bulletin board regularly used for official notices by the Agency. The secretary to the Board shall cause to be kept minutes of its meetings, both regular and special,

ARTICLE 6. VOTING.

The presence of a majority of the directors then appointed shall be required in order to constitute a quorum necessary for the transaction of the business of the Board. No action of the Board shall be valid unless a majority of such quorum of directors then appointed concur therein by their votes.

ARTICLE 7. AFFIRMATIVE ACTION.

Selections of persons for appointment to the Board, and employment of persons in positions within the Agency will be conducted in a manner which ensures that there is no discrimination against any Board member or employee, or candidates for these positions, because of age, sex, race, color, religion, national origin, or handicap. Positive action will be taken to further and enhance the representation of women, members of minority groups, and handicapped persons on the Board and staff of the Agency.

ARTICLE 8. OFFICERS AND EMPLOYEES.

The Board shall annually elect a chairperson from its members,

The Board shall appoint, and fix and cause to be paid, the compensation of the Chief Executive Officer, who shall act as Chief Administrative Officer of the Agency, and who shall perform such other and further duties as may be determined by the Board.

The members of the Board, other than the Chief Executive Officer serving ex officio, shall serve without compensation but may be reimbursed for necessary expenses incurred in connection with attendance at meetings of the Board or for necessary expenses incurred in performing services on behalf of and at the prior and express request of the Board,

The appointees and employees of said Agency shall not be deemed by operation of this Agreement to be the employees of either FWL or SWRL, No member of the Board nor any officer, appointee, or employee of the Agency shall be entitled to any compensation or fringe benefits, including but not limited to sick leave, retirement, pension, or vacation, from FWL or SWRL by virtue of his or her office or employment by the Agency. Provided that nothing shall prohibit the Agency from contracting for the services of employees of FWL or SWRL, or of other institutions or organizations, and reimbursing them for the costs, including salaries and fringe benefits, involved in providing such services. Further provided that nothing herein shall prohibit the Agency and FWL or the Agency and SWRL from agreeing that employees of FWL or SWRL, respectively, may also be employees of the Agency,

ARTICLE 9. SCOPE OF POWERS.

(a) The Agency shall be an administrative, initiating, advisory, coordinating, and evaluating entity, The Agency shall have the power and authority to exercise any power common to the parties hereto, FWL and SWRL, and to exercise any power set forth in the California Government Code, Section 6508, provided that the same are for furtherance of the objectives of this Agreement as contained herein and in the recitals set forth above, and may to

the extent permissible thereunder, enter into contracts in its own name with persons and with public or private agencies, boards, and other entities all subject to the terms and conditions of this Agreement.

(b) Neither the Agency nor the Board shall have any power or authority to bind FWL, SWRL or the signatory parties to the Joint Powers Agreement creating FWL or SWRL to the debts, liabilities and obligations of the Agency and no debt, liability or obligation of the Agency shall be the debt, liability or obligation of FWL, SWRL or the signatory parties to the Joint Powers Agreement creating FWL or SWRL,

(c) Pursuant to Section 6509 of the California Government Code, the exercise of the powers of the Agency shall be in accordance with the manner of exercising such powers by FWL and SWRL, which is in accordance with the procedures followed by the Regents of the University of California.

(d) The Board shall adopt appropriate rules not inconsistent herewith for the orderly transaction of its business,

(e) The Agency shall have no power or authority to incur any obligations for itself or on behalf of FWL or SWRL in excess of the amount appropriated to its use by a funding source. Provided, however, the Agency is authorized to obtain funds for a short period of time to meet operational expenses from advances of funds from FWL or SWRL or from private lending sources.

(f) The Agency shall, without limitation, have the specific power to establish or contract with research centers and laboratories, to carry out or suggest experimental educational projects, to develop pilot educational programs, to conduct or authorize educational research and development including the development of all varieties of educational materials, teaching aids, and other educational components, to collect and disseminate educational information, to coordinate educational research programs, to develop educational prototypes, to evaluate educational programs and activities, and to engage in other similar, related activities.

ARTICLE 10. ADVISORY COUNCIL.

The Agency may from time to time establish and abolish one or more advisory councils to perform such functions as the Agency may determine.

ARTICLE II. INSURANCE.

The Agency shall insure itself, FWL, SWRL and the members of the Board from loss, liability, and claims arising out of or in any way connected with the performance of this Agreement.

ARTICLE 12. FUNDS AND EXPENDITURES.

(a) The Agency shall have the power and authority to receive, accept, and expend or disburse, funds by contract or otherwise, for purposes consistent with the provisions hereof, which funds may be provided by the United States Government, any State, or any subdivision of a State, and from any other person, agency or organization, whether public or private, for the purposes specified herein, and shall have the duty to maintain at all times a complete and accurate system of accounting for said funds.

(b) The Agency shall have the power and authority to receive, accept, and utilize the services of personnel offered by FWL or SWRL, or their representatives or agents; to receive, accept, and utilize property, real or personal, from FWL or SWRL, or their agents or representatives; and to receive, accept, and expend or disburse funds, by contract or otherwise, for purposes consistent with the provisions hereof, which funds may be provided by FWL or SWRL, or their agents or representatives, The Agency is authorized to enter into interagency agreements with state agencies pursuant to Section 6514.5 of the California Government Code.

(c) Each and every expenditure of funds shall be authorized or approved by the Board pursuant to a budget process as described in subsection (f) hereof, or by other appropriate procedures approved by the Board, and shall be audited by a firm of certified public accountants to be selected by the Board and paid by the Agency,

(d) The Agency shall have no power or authority to assess FWL or SWRL, the signatory parties to the Joint Powers Agreement creating FWL or SWRL or the members of the Board for dues or contributions of any kind whatsoever.

(e) The Board shall establish procedures for the investment or deposit of its funds.

(f) The Board shall adopt appropriate budgetary procedures, The Agency shall file annually with the designated representatives of FWL and SWRL a statement of the actual income and expenditures made during the prior fiscal year.

(g) The "fiscal year" of the Agency shall be December 1 to and including the following November 30, or such other annual period as may be prescribed from time to time by resolution of the Board,

ARTICLE 13. WITHDRAWAL OF PARTIES AND TERMINATION.

The powers and authority of the Agency shall continue until termination of this Agreement, The Agreement may be terminated at any time upon mutual written agreement of FWL and SWRL, Upon two (2) year's prior written notice, FWL or SWRL may withdraw from its status as a party to this Agreement, provided that at such time it has either discharged, or has arranged to the satisfaction of the remaining party for the discharge of, any pending obligations it expressly may have assumed hereunder, and that written notice of intention to so withdraw has been served. upon the effective date of withdrawal, the Joint Powers Agreement will terminate. Upon the termination date all contracts held by the Agency shall be assigned, to the extent permitted under the contract, to the party with primary duties under the contract or according to terms mutually agreed upon by FWL and SWRL.

ARTICLE 14. DISPOSITION OF PROPERTY AND FUNDS.

In the event of the final termination of this Agreement, any property interest remaining in the Agency following discharge of all obligations due by the Agency shall be disposed of by sale or other disposition according to law, and the proceeds, in cash or by their fair market value in kind at the time of final termination, distributed to FWL or SWRL in proportion to its respective contributions to the Agency.

ARTICLE 15. DISPUTE RESOLUTION.

Any dispute arising from disposition of assets of the Agency, assignment of contracts or any other matter related to this Agreement shall be resolved by alternative dispute resolution procedures, culminating in binding arbitration with a single neutral arbitrator in San Francisco, California, Neither party shall have the right to bring an action in court against the other party for any dispute arising from or related to this Agreement.

ARTICLE 16. AMENDMENTS.

This Agreement may be amended at any time by mutual agreement of FWL and SWRL according to the procedures of said parties, provided said amendment is to further carry out the purposes hereinabove expressed. Any such amendment shall be effective upon the date of final execution thereof by FWL and SWRL.

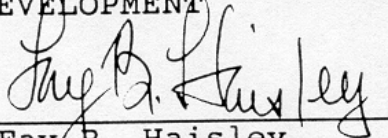
ARTICLE 17. SEVERABILITY.

Should any portion, term, condition, or provision of this Agreement be decided by a court of competent jurisdiction to be illegal or in conflict with any law of the State of California, or be otherwise rendered unenforceable or ineffectual, the validity of the remaining portions, terms, conditions, and provisions shall not be affected thereby.

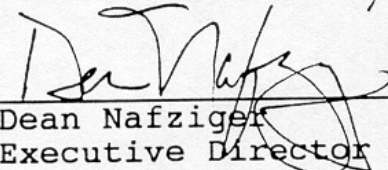
IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be duly executed by their authorized officers thereunto duly authorized as set forth herein below.

FAR WEST LABORATORY
FOR EDUCATIONAL RESEARCH
AND DEVELOPMENT

BY:

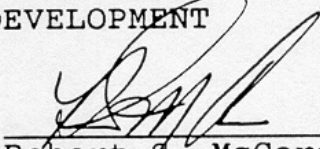

Fay B. Haisley
Chair of Board

BY:


Dean Nafziger
Executive Director

SOUTHWEST REGIONAL LABORATORY
FOR EDUCATIONAL RESEARCH
AND DEVELOPMENT

BY:


Robert S. McCord
Chair of Board

BY:

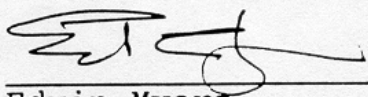

Edwin Myers
Executive Director

Exhibit C

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W.B.R. & H.

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Internal Revenue Service

Department of the Treasury

Index Number: 0115.00-00

Washington, DC 20224

Mr. Gary Barnes, Chief Financial
Officer
WestEd
4665 Lampson Avenue
Los Alamitos, CA 90720-5199

Person to Contact:

Adrian Michur
Telephone Number:
(202) 622-3089
Refer Reply to:

CC:DOM:FI&P:2 PLR-253942-96

Date: MAY 1 1997

X	=	WestEd EIN: 94-3233542
Y	=	Far West Laboratory for Educational Research and Development EIN: 94-1625540
Z	=	Southwest Regional Laboratory for Educational Research and Development EIN: 94-2428178
Pact	=	Joint Powers Agreement
Law 1	=	Section 6500, Title 1, Division 7, Chapter 5, Article 1, California Government Code
Law 2	=	Section 6502, Title 1, Division 7, Chapter 5, Article 1, California Government Code
Law 3	=	Section 6507, Title 1, Division 7, Chapter 5, Article 1, California Government Code
Law 4	=	Section 6508, Title 1, Division 7, Chapter 5, Article 1, California Government Code
Letter 1	=	Determination letter dated August 16, 1966
Letter 2	=	Letter dated October 18, 1966
District 1	=	San Francisco District
District 2	=	Los Angeles District
State 1	=	California
State 2	=	Arizona
State 3	=	Nevada
State 4	=	Utah

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PLR-253942-96

Dear Mr. Barnes:

This is in reply to a letter dated November 25, 1996, and subsequent correspondence, requesting a ruling that the income of X is excludable under section 115 of the Internal Revenue Code. The information submitted for consideration is summarized below.

X, Y and Z are public agencies under Law 1 of State 1. The members of X are Y and Z. The members of Y and Z are agencies of State 1, State 2, State 3 and State 4.

Under Law 2 of State 1, public agencies may agree to jointly exercise any power common to the agencies, even though one or more of the contracting agencies may be located outside State 1. Such agreements are known as "Pacts" and establish an entity that is itself a public agency for purposes of Law 1.

Under Law 3 of State 1, a Pact is a public entity separate from the parties forming it.

Under Law 4 of State 1, a Pact that has the power to hire employees, make contracts, or to hold, receive, or dispose of property can sue or be sued in its own name. X, Y, and Z each have these powers.

In Letter 1, the District Director of District 1 informed Y that it was not subject to federal income tax. The letter states that it is a determination letter, and cites section 115(1) of the Code.

In Letter 2, the District Director of District 2 informed Z that it was not subject to federal income tax, stating that Z was an instrumentality of a state.

Y and Z formed X to combine or merge the educational research and related educational activities previously conducted separately by Y and Z. X's goal, as stated in the documents relating to its formation as a Pact, is to develop fundamental improvements in education and to conduct educational research to benefit the public and private schools, colleges, and universities of States 1, 2, 3, and 4 ("Schools"). X's activities include:

1. Participating in school reform by converging educational research into practical applications, providing knowledge and assistance to Schools.
2. Distributing educational knowledge to Schools through publications, conferences, seminars, and electronic networks.

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PLR-253942-96

3. Helping to plan and execute long-term educational reform programs.
4. Implementing new curricula within school districts.
5. Conducting applied educational research on practical questions, such as how students learn and what is needed to implement schoolwide changes.
6. Providing strategic policy analysis, evaluating efforts to change, and developing educational products such as training modules, instructional videos, planning guides and casebooks.

The goals and activities of X are virtually identical to those of Y and Z.

X is funded by federal, state, and local government, as well as private foundations, which provide grants and research contracts. X conducts its activities throughout the United States, but concentrates them in States 1, 2, 3, and 4. X's activities are conducted exclusively by its own employees, who are hired and paid directly by X. X is controlled by a board of directors composed of all of the directors of Y and Z. The directors of Y and Z are appointed by the governing bodies or executive officer, as the case may be, of the public agencies that are the membership of Y and Z.

Section 115(1) of the Code provides that gross income does not include income derived from any public utility or the exercise of any essential governmental function and accruing to a state or any political subdivision of a state.

Rev. Rul. 71-589, 1971-2 C.B. 94, provides that the income from property held in trust by a city that was to be used by the city for certain charitable purposes is not subject to federal income tax. Although Rev. Rul. 71-589 does not explicitly so state, the holding in the revenue ruling means that a determination was made that the income in question was derived from the exercise of an essential governmental function and accrued to a political subdivision within the meaning of section 115(1) of the Code. Rev. Rul. 71-589 specifically mentions several types of functions that the trust might perform, such as support of a hospital, schools, maintenance of a park, or other purposes ordinarily recognized as municipal functions.

Rev. Rul. 90-74, 1990-2 C.B. 34, concerns an organization that is formed, operated and funded by political subdivisions to pool their casualty risks, or other risks arising from their obligations concerning public liability, workers' compensation, or employees' health. Rev. Rul. 90-74 states that the income of

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PLR-253942-96

the organization is excluded from gross income under section 115(1) of the Code if private interests do not participate in the organization or benefit more than incidentally from the organization. In Rev. Rul. 90-74 the benefit to the employees of the political subdivisions was excepted as incidental.

Under Rev. Rul. 77-261, 1977-2 C.B. 45, the income from a fund, established under a written declaration of trust by a state for the temporary investment of cash balances of the state and its political subdivisions, which purchase units of participation and have an unrestricted right of withdrawal, is excludible from gross income. The fund, however, is classified as a corporation and must file a federal income tax return.

Providing the Schools of States 1, 2, 3, and 4 with X's services is an essential governmental function because it is of direct benefit to the agencies comprising the memberships of Y and Z. These agencies are engaged in providing educational services, independently of the activities of X, Y, and Z. The fact that the work-product of X may be shared with private schools within States 1, 2, 3, and 4 or the rest of the United States, or to nonprivate schools within the rest of the United States, is merely an incidental private benefit. There are no facts indicating that the work-product of X is not the proprietary material of X, Y, or Z.

Accordingly, the income of X is excludable from gross income under section 115 of the Code.

This ruling is directed only to the taxpayer that requested it. Section 6110(j)(3) of the Code provides that it may not be used or cited as precedent.

Except as specifically provided otherwise, no opinion is expressed on the federal income tax consequences of the transaction described above.

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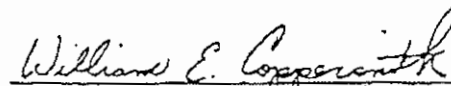
PLR-253942-96

In accordance with the terms of a power of attorney on file in this office, a copy of this letter is being sent to your authorized representative.

Sincerely yours,

Acting Assistant Chief Counsel
(Financial Institutions & Products)

By:



William E. Coppersmith
Chief, Branch 2

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Internal Revenue Service

Department of the Treasury

Washington, DC 20224

Index Number: 0115.00-00

Person to Contact:

Telephone Number:

Refer Reply to:

CC:DOM:FI&P:2 PLR-253942-96

Date: MAY 1 1997

X =

Y =

Z =

Pact =

Law 1 =

Law 2 =

Law 3 =

Law 4 =

Letter 1 =

Letter 2 =

District 1 =

District 2 =

State 1 =

State 2 =

state 3 =

State 4 =

This document may not be used or cited as precedent.
Section 6110 (i) (3) of the Internal Revenue Code.



excellence in research, development, and service

Minimum Qualifications Item c.

WestEd Officers

Jannelle Kubinec

Chief Executive Officer
730 Harrison Street
San Francisco, CA 94107-1242

Mike Neuenfeldt

Executive Vice President and Chief Financial Officer
730 Harrison Street
San Francisco, CA 94107-1242

Catherine Walcott

Executive Vice President and Chief Growth and Strategy Officer
730 Harrison Street
San Francisco, CA 94107-1242

Stefanie Phillips

Chief Talent Officer
730 Harrison Street
San Francisco, CA 94107-1242



Strategic Planning and Performance Scorecard

Request for Proposal No. 3120003047
Mississippi State Department of Education

February 5, 2025

Studer Education

SUBMITTED BY:

Victoria Wells

Partner Development Director, Studer Education

703-336-9616 | vwells@studereducation.com

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COVER PAGE – Proposal Cover Sheet (Appendix A)

Appendix A – Proposal Cover Sheet

Company/Name: Studer Education LLC

Proposals must be submitted as directed in the **Proposal Submission Requirements** on or before the submission deadline specified in the solicitation.

Company Representative and Title	Melissa Matarazzo, Chief Administrative Officer
Mailing Address	6732 W Coal Mine Ave, Unit 501
City, State, Zip	Littleton, CO 80123
Telephone:	(978) 518-0956
E-Mail Address:	mmatarazzo@studereducation.com

Please identify the Office/Branch which will provide services for the MDE if different from above:

Contact Person and Title	Charlotte Boling, Leader Coach
Telephone Number	(850) 712-6147
Email Address	cboling@studereducation.com
Physical Address	6732 W Coal Mine Ave, Unit 501
City, State, Zip	Littleton, CO 80123
Mailing Address	6732 W Coal Mine Ave, Unit 501
City, State, Zip	Littleton, CO 80123

1. Are you currently registered as a Supplier in MAGIC? YES NO
2. If known, what is your supplier number? VND213345901
3. Are you currently registered with PayMode? YES NO
4. Are you a minority owned company? YES NO

By signing below, the Company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies the statements below on behalf of the company:

- That the Offeror will perform the services required at the prices stated in their proposal.
- That the pricing submitted will remain firm for the contract term.
- That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date.
- That the company is licensed or authorized to provide the proposed services in the State of Mississippi.
- The Offeror indicates and is in agreement with the Standard Terms and Conditions as set forth above. If the Offeror objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.
- The State of Mississippi utilizes the Mississippi Accountability System for Government Information and Collaboration (MAGIC) system to manage contracts. Additionally, electronic payments are issued through an electronic portal called [PayMode](#). In order to do business with the State of Mississippi, all Suppliers must be registered with both systems. By submitting a proposal, the Offeror certifies it is registered with both systems and if not already registered, will do so within seven (7) business days of being notified by the MDE that it has been awarded a contract.

Authorized Signature:  Date: 1/29/2025

COMPONENT 1 – PLAN OF ACTION

Tab 1 – Production/Detailed Service Plan

Founded in 2010, Studer Education has been developing leaders and teams for 15 years. Our team of 50 professionals works with K-12 and higher education leadership teams to develop and implement strategic plans in more than 160 education organizations annually.

Minimum Qualifications and Company Overview

Studer Education was founded in 2010 as a division of The Studer Group LLC, established in 1999, and acquired by Beyond Campus Innovations in 2024. We are a leading service provider nationwide and in Mississippi, focused on improving outcomes in K-12, community college, and higher education institutions. Studer Education works with 160-200 education organizations annually to advance organization-wide alignment and outcomes. We support education organizations with an average of 50 employees across the past 5 years. Studer Education is in good standing to transact business in Mississippi (please see Tab 1, page 5) and in agreement to

provide all services directly related to potential contract from offices located in the United States, specifically in Mississippi and virtually from Florida, Texas, Kentucky, Wisconsin, and New York. We also agree to secure a performance bond for 100% of the awarded contract amount and are not debarred if federal funds are allocated for payment.

Our team has successfully facilitated 100+ strategic plans, which have included accreditation and certifications related to strategic planning, and/or built leadership capacity to implement strategic plans with scorecards, among other strategies, with 160+ education organizations nationwide and 5+ education organizations across Mississippi each year – which have included *Ocean Springs School District*, *Oxford School District*, *Pass Christian Public School District*, *Tupelo Public School District*, *the University of Mississippi National Center for School-University Partnerships*, and *Vicksburg Warren School District*. We leverage best practice continuous improvement and organizational excellence practices to accelerate K-12 institutions' ability to achieve the measures that matter most to the organization through strategic plan and performance scorecard development, in addition to providing organizational excellence coaching, tools, and resources that sustainably develop leaders.

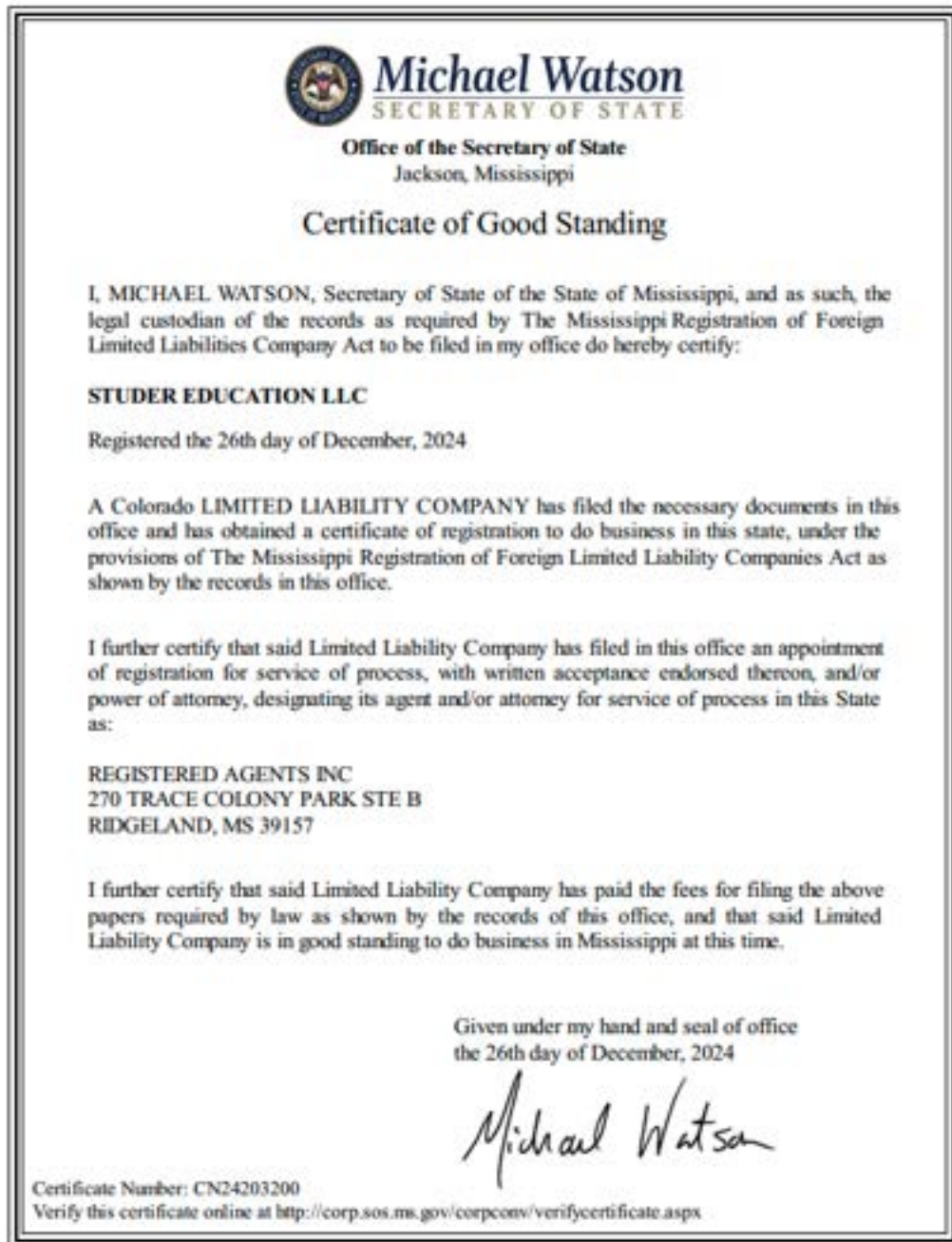
Our strategic planning and performance scorecard development coaching model is grounded in the **Evidence-Based LeadershipSM Framework, Nine Principles[®] of Organizational Excellence**, and aligned to the [Baldrige Excellence Framework](#) (a framework developed by the U.S. government's commerce department to guide organizations to excellence by applying performance excellence practices). These frameworks are informed by 20 years of observing and researching the behaviors of high-performing leaders who are steering high-performing organizations. Embedding our organizational excellence strategies and continuous improvement frameworks in the Mississippi State Department of Education (MDE)'s strategic planning and performance scorecard advances the Department's capacity to:

- Effectively engage community and stakeholder voices to set vision and direction
- Build ownership into the comprehensive plan and performance scorecard

State Board of Education Strategic Planning and Performance Scorecard

Mississippi Department of Education

- Create a dynamic, forward-looking plan that can evolve, aligns with the organization's mission, and deploys systems and structures to align goals with resources
- Develop leadership and organizational capacity for addressing current and future educational challenges and achieving meaningful results



Our **Evidence-Based LeadershipSM (EBL) strategic plan execution framework**, shown in Figure 1, facilitates the development of the new strategic plan as a clear roadmap that aligns with the mission, goals, and evolving priorities of the Mississippi State Department of Education (MDE) and supports the Department's ability to effectively deploy the newly refined strategic plan through a performance scorecard with measurable indicators to track progress and ensure accountability.

Align Goals, Behaviors and Processes

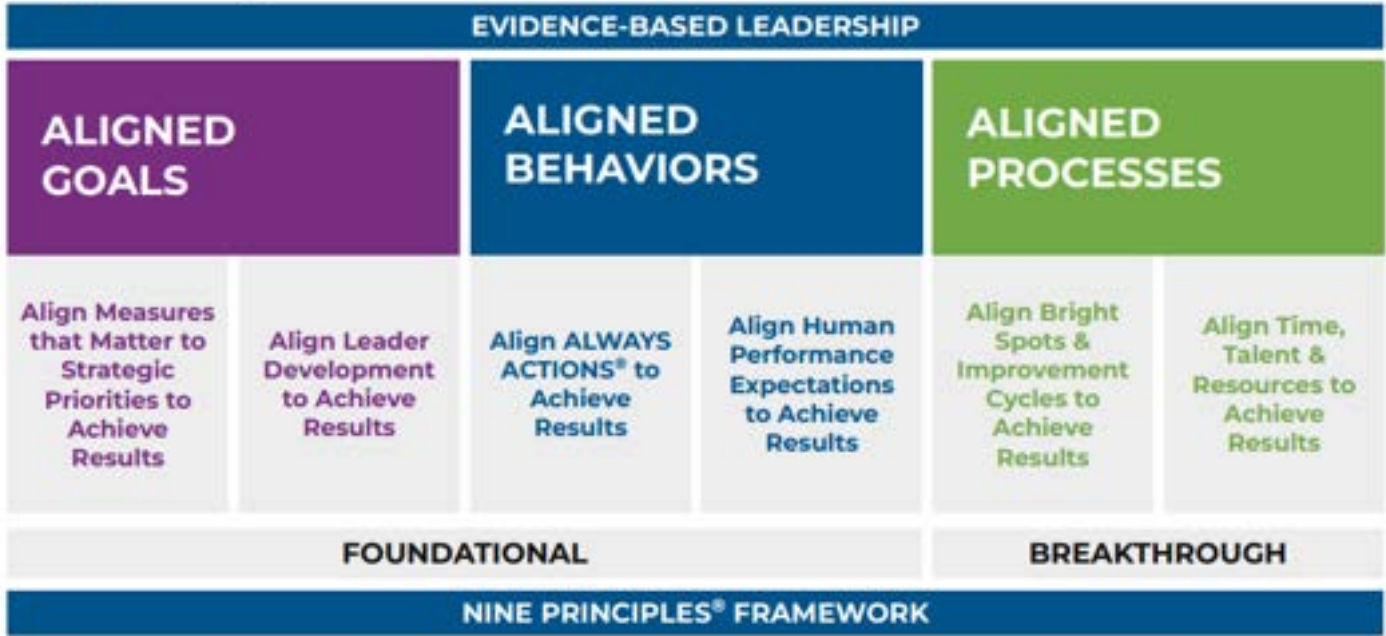


Figure 1. Studer Education’s EBL framework supports the creation of the MDE’s Strategic Plan and Performance Scorecard. *The MDE can create a dynamic, forward-looking plan and performance scorecard that aligns with its mission and addresses current and future educational challenges.*

To ensure that the plan can evolve to address current and future educational challenges, we also recognize the alignment of our **Nine Principles® for Organizational Excellence framework**, shown in Figure 2, which codifies the skills and tools necessary for the development, implementation, and monitoring of the strategic plan, including performance scorecard development and deployment.

The Nine Principles® Framework



Figure 2. The **Nine Principles®** framework underpins and guides the use of strategies and tools, such as performance scorecards, to implement the strategic plan. *The MDE can leverage the Nine Principles® framework*

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to define and advance the way leaders and employees engage each other and those they serve to advance culture and organizational outcomes.

K-12 organizations further choose to work with Studer Education because of the educational expertise of our coaching team. Our coaches are former Superintendents/Superintendents of the Year, highly accoladed K-12 district leaders, state leaders, principals, and teachers. Our coaches have been published in education research journals and are regularly highlighted in the *AASA Magazine for School Administrators*, are faculty members for the AASA Superintendent Certification Program and the Carnegie Foundation for the Advancement of Teaching (an improvement science national leader in education), and have been sought after to facilitate Networked Improvement Collaboratives (NICs), including for the Council of Chief State School Officers (CCSSO) and for the National Center for School and University Partnerships (NCSUP) at the University of Mississippi to replicate Mississippi's groundbreaking work to raise K-12 literacy achievement from 50th to 35th in the nation for math achievement.



The MDE's dedicated coach is Dr. Charlotte Boling, a Coach Director with industry experience in K-12 and University settings, including with coaching across Mississippi. She brings decades of experience in continuous improvement, organizational efficiency, instructional enhancement, and student growth. Prior to joining Studer Education,

Dr. Charlotte Boling serves as an expert coach in the MDE's desired areas and brings coaching experience from Mississippi.

Dr. Boling served K-12 education as a district leader, school-based instructional coach, and teacher. Her higher education experience includes work as an associate professor, assistant dean, department director, and professional development designer. Her expertise includes working with educational leaders to develop systems of high performance while ensuring student success.



The MDE and Dr. Boling will also be supported by fellow dedicated coach Dr. Reggie Todd, a former University leader who brings experience from K-12, community college, and university settings. He brings decades of experience in continuous improvement, employee engagement, instructional enhancement, and student growth. As a classroom teacher, Dr. Todd held teacher-leader positions such as department chair, professional development provider, building association, representative and others. His post-secondary experience includes work as an associate professor, graduate programs coordinator, department chair, and faculty development director. He has also contributed to several professional organizations through executive board service, publishing and presenting research, and brings experience in alternative certification work where he led a team of faculty to develop online instructional content and other educator preparation support services to ensure teacher candidate success with certification examinations.

Dr. Reggie Todd serves as an expert coach alongside Dr. Boling in the MDE's desired areas and brings coaching experience from Florida.

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The MDE, Dr. Boling, and Dr. Todd will also receive support from **Dr. Melissa Matarazzo** – a former teacher, principal, and school district leader with decades of industry experience as a principal, district executive director, and education consultant, and who has led our coaching team as Chief Administrative Officer for over 6 years; **Dr. Deanna Ashby** – a former Superintendent who brings 29 years of experience in public schools and working with state associations as a Senior Coach Director who provides guidance to our coaching team; and **Dr. Casey Blochowiak** – a former district-level leader in the nationally recognized School District of Menomonee Falls who focuses on the advancement of teaching and learning and implementation of continuous improvement processes as a Senior Coach Director.

The Studer Education team is situated within BCI Holdings with Founder/President Dr. Janet Pilcher and CEO David Marshall, who can be found on the organizational chart shown in Figure 3.

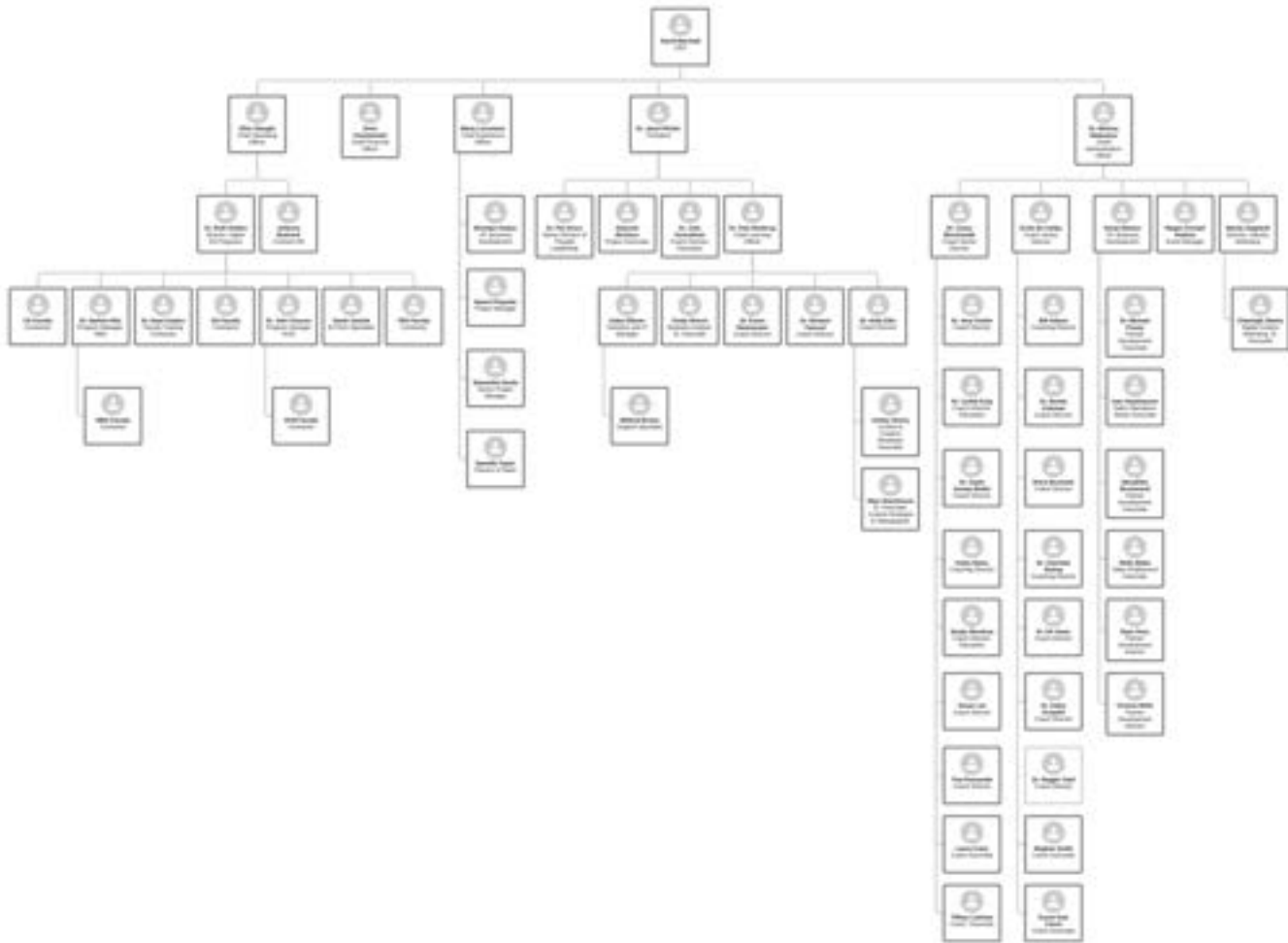


Figure 3. Studer Education’s organization chart shows our relationship with our parent company, Beyond Campus Innovations. *Your Leader Coach Dr. Charlotte Boling* receives support from *Coach Director Dr. Reggie Todd*, *Senior Coach Directors Dr. Deanna Ashby and Dr. Casey Blochowiak*, and *Chief Administrative Officer Dr. Melissa Matarazzo*.

As the MDE reviews our detailed service plan below, we are pleased to offer as references for services received from the MDE’s requested scope of services and whose contact information can be found under COMPONENT 2 – ADMINISTRATION, Tab 3 – *References*:

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1. **Bradley Roberson**, Superintendent of Oxford School District in Mississippi
2. **Dr. Brendan Kelly**, President of Arkansas State University System and former President of University of West Georgia, who has received services at both institutions
3. **Dr. Vincent June**, Chancellor of South Louisiana Community College

Scope of Services: Implementation, Deliverables, and Expected Outcomes/Results

Based on the MDE's priorities stated in the RFP to establish a clear roadmap that aligns with the mission, goals, and evolving priorities, while providing measurable indicators to track progress and ensure accountability, Studer Education recommends the suggested two-phase approach across one year: (1) Strategic Plan Development and (2) Performance Scorecard Refinement and Implementation.

Our experience and services for the suggested two-phase approach across one year directly align with the MDE's specific needs as shown in Figure 4.

Phase	Service Format	Outcomes	Alignment to RFP Scope of Services
Strategic Plan Development	<ul style="list-style-type: none"> On-Site Leadership Development Institutes and Strategy Sessions Virtual One-on-One Coaching with the State Superintendent or Designee Virtual Coaching with the Steering Committee (scheduled in format and cadence according to MDE's needs) Virtual Focus Groups with Key Stakeholders, including Executive Leadership Team and Board, Legislative Representatives, MEC and AccelerateMS, Community Colleges and IHL, and One-on-One Interviews with 5 CEO's of MS' largest corporations 	Strategic plan for the MDE guided by a vision, mission, core values, and 4-5 priorities each with a set of strategic actions and measures, informed by stakeholders, and performance scorecard to track KPIs and monitor progress	<ol style="list-style-type: none"> 1. Project Initiation and Planning, including: Kick-off Meeting, Project Work Plan, and Stakeholder Identification 2. Environmental Scan and Data Collection including: Review of Existing Documentation, SWOT Analysis, Environmental Scan, and Stakeholder Interviews 3. Strategy Development including: Mission and Vision Review, Goal Setting, and Strategy Formulation 4. Performance Scorecard Development including: KPI Identification and Scorecard Design 5. Stakeholder Engagement and Workshops including: Stakeholder Workshops, Engagement Plan, and Feedback Incorporation 6. Drafting and Finalizing the Strategic Plan including: Draft Strategic Plan, Review and Revision, and Final Strategic Plan 7. Final Presentation and Handover including Presentation to the Board, Documentation Handover, and Training Session 8. Implementation and Monitoring Plan, including Implementation Roadmap
Performance Scorecard Refinement and Implementation	<ul style="list-style-type: none"> On-Site Leadership Development Institutes and Strategy Sessions Virtual One-on-One Coaching with the State Superintendent or Designee 	Alignment of goals, actions, and processes across the MDE to build	<ol style="list-style-type: none"> 4. Performance Scorecard Development including: Scorecard Design and Data Collection Mechanisms

Phase	Service Format	Outcomes	Alignment to RFP Scope of Services
	<ul style="list-style-type: none"> Virtual Coaching with the Department leads (scheduled in format and cadence according to MDE's needs) Virtual Focus Groups with Key Stakeholders 	leadership team capacity and accelerate achievement of outcomes that matter most by using best practice, high-leverage leadership strategies and systems	5. Stakeholder Engagement and Workshops including Stakeholder Workshops and Feedback Incorporation 6. Drafting and Finalizing the Strategic Plan including Draft Strategic Plan 7. Final Presentation and Handover including Presentation to the Board, Documentation Handover, and Training Session 8. Implementation and Monitoring Plan including Implementation Roadmap, Monitoring and Reporting Mechanism, and Review and Adjustment Protocol

Figure 4. Studer Education Aligns with the MDE's Needs. *The MDE can improve statewide outcomes through Studer Education's tailored strategic planning and performance scorecard development/implementation.*

Phase One: Strategic Plan Development

The MDE seeks a partner that can update the strategic plan with re-assessed goals. We propose a 6-month period for strategic plan development to support the Executive Leadership Team (ELT), Board, and steering committee with visioning the strategic plan; include a variety of voices in the strategic plan creation; analyze data to determine trends and establish a performance tracking system with the steering committee; and develop the strategic plan as well as roll-out the strategic plan and performance scorecard to the community. The 6-month timeframe will allow for strong strategic plan development and give stakeholders time to inform the strategic plan, without being a rushed or drawn-out process.

Our holistic strategic planning approach is designed to engage statewide stakeholders in a customized, structured, research-based process to develop a student-centered vision for next-level statewide success collaboratively. Grounded in the foundational stage Strategic Priorities and Goals within the Evidence-Based LeadershipSM Framework as well as Principle 1: Commit to Excellence of the Nine Principles[®] of Organizational Excellence, we recommend and support broad stakeholder engagement and take a comprehensive view of success measures (academic and operational) across the system. The resulting plan is designed to enable leaders, the Board, and legislation to have a visionary and implementable plan for realizing the collaboratively developed vision for success. The strategic plan typically includes a new or renewed mission, vision, set of values/core beliefs, and aligned strategies and actions to achieve measurable, meaningful results.

Strategic Plan Development is a key first phase to establish a strong foundation for next-level success across the MDE. While the resulting strategic plan is highly significant, the process itself is critical for engaging the community and stakeholders in developing and owning a shared vision for success.

Studer Education will begin with **Project Initiation and Planning**. To confirm the development process and resulting strategic plan meet the MDE's expectations and specific needs regarding stakeholder engagement and other considerations, we engage with the State Superintendent and other key SBE and Board Designees upon commencement of the engagement together in a **Kick-off Meeting**. The Kick-off Meeting, or initial session, serves to clarify objectives, timelines, and roles – as well as provide a process overview and obtain MDE input. Engaging with the key SBE and Board

Designees in the Kick-off Meeting then informs the creation of the customized **Project Work Plan**. Based on the discussion and information gathered from the Kick-off Meeting, we develop a high-level work plan to tailor the planning process and timeline, including **Stakeholder Identification** to confirm broad and diverse inclusion of community and stakeholder groups, as well as outline milestones, deliverables, and communication protocols as designed in conjunction with the MDE team.

The Project Work Plan as informed by the **Kick-off Meeting** will also ensure the basis of the **Implementation Roadmap** for the **Implementation and Monitoring Plan** – including key milestones as outlined in this response; further task breakdown and resources/support such as Zoom meeting set up for virtual meetings, venue arrangements when on-site, and what MDE members will be vital for the process; a discussion of dependencies between phases given that we customize all strategic planning processes; and agreed upon deliverables – and that Implementation Roadmap basis will be expanded upon in Phase Two. To ensure the Project Work Plan is successfully executed, we will hold monthly 1-hour one-on-one coaching with the State Superintendent or designee to ensure statewide alignment, provide progress updates on strategic planning process, and plan for Leadership Development Institutes and Strategy Sessions to develop the strategic plan and scorecard.

Following Project Initiation and Planning, we will then move into **Environmental Scan and Data Collection** with the MDE's steering committee and **Stakeholder Engagement and Workshops** to inform the development of the new strategic plan. Studer Education will help the MDE form a strategic plan steering committee to serve as an advisory body throughout the process and collaboratively develop the draft plan components with input from focus groups, surveys, and other input processes facilitated by and with Studer Education; the steering committee can also assist with Stakeholder Engagement and Workshops.

Alongside the steering committee, we will complete a targeted **Review and Analysis of Existing Documentation, Assessment, Planning Documents, and Other Data** (current strategic plans, performance data, and any other relevant documents to understand the organization's context). Through on-site one-day (8 hour) Leadership Development Institutes and Strategy sessions that are recommended on a quarterly basis and scheduled in format and cadence to the MDE's needs, virtual monthly 1-hour one-on-one coaching with the State Superintendent or designee, and virtual half-day (4 hours) per month, we will also engage with the steering committee to conduct a **SWOT Analysis (Strengths, Weakness, Opportunities, Threats)** to assess internal capabilities and external challenges and analyze themes from a comprehensive **Environmental Scan** of the current educational landscape, including trends, regulations, and technological advancements affecting the state of Mississippi.

In addition to analyzing quantitative data, we will also develop a **Stakeholder Engagement Plan** to ensure continued stakeholder involvement outside of the steering committee throughout the process, from strategy formulation to final approval. Studer Education will facilitate focus groups, interviews, and/or town hall sessions with leaders, the board, faculty, staff parents, students, business, and community stakeholders (as desired – with the stakeholder groups to be determined in consultation with the MDE to confirm broad representation) to supplement survey data and provide additional qualitative input.

The Stakeholder Engagement Plan will map out **Stakeholder Surveys/Interviews** conducted by Studer Education to collect input from key stakeholders (board members, educators, policymakers, students, and community members) through surveys, focus groups, and/or interviews. From our understanding of the MDE's goals, we currently recommend the following, as virtual and/or in-person, focus groups that can be subject to change based on MDE feedback:

- 2 90-minute focus groups, led by the Studer Education coach and MDE steering committee, with Key Stakeholders including:
 - **ELT and Board** to shape mission, vision, and pillar goals for the MDE for next 5 years (or length of MDE's desired visioning)
 - **Legislative Representatives** such as Speaker of the House, Lt. Governor, and Vice Chairs to bridge MDE and state legislative needs, and ensure plan buy-in
 - **MEC and AccelerateMS** to gain workforce development perspective and needs from Mississippi K-12 graduates
 - **Community Colleges and IHL** to gain higher education perspective and needs from Mississippi K-12 graduates
- 1 Round of 30-Minute One-on-One Sessions Led by Coach with **CEOs of 5 of Mississippi's largest corporations** to identify needs from K-12 graduates to be successful in most competitive workplace environments

Following the analysis and collection of quantitative and qualitative data, we will begin **Strategy Development** to analyze survey and focus group data and present findings while continuing **Stakeholder Engagements and Workshops** for feedback on **Drafting and Finalizing the Strategic Plan**. We will review the findings with the strategic planning steering committee and facilitate working sessions with the committee to refine or develop the strategic plan components, including mission, vision, core values statements, draft goals and metrics, and draft strategic initiatives. As we begin to draft the strategic plan with the feedback gathered and analysis completed, we will facilitate discussions with leadership to revisit or reaffirm the organization's mission, vision, and core values with a **Mission and Vision Review**; conduct **Goal Setting** to establish long-term strategic goals based on collected data, stakeholder input, and the organization's vision; and develop key strategies and initiatives that address identified needs and opportunities, including those related to educational outcomes, workforce readiness, and technology integration through **Strategy Formulation**. The analysis from the Environmental Scan and Data Collection, Stakeholder Engagement and Workshops, and Strategy Development will inform the development of the **Draft Strategic Plan** that includes the mission, vision, strategic goals, key initiatives including **KPI Identification** for each strategic goal to ensure they are measurable and aligned with the organization's mission, and the **Performance Scorecard Development** with **Scorecard Design** including a draft performance scorecard template to visually track progress toward strategic goals.

As we begin **Drafting and Finalizing the Strategic Plan**, our final **Stakeholder Workshops** with board members, educators, and community leaders will give us the opportunity to gather feedback on the draft strategic plan and performance scorecard and use **Feedback Incorporation** to revise the strategic plan and scorecard with the steering committee based on stakeholder input and feedback received during workshops. We will then revise the Draft Strategic Plan with the steering committee and support the steering committee with **Review and Revision**, including presenting the draft to the leadership team for review and make necessary revisions based on feedback, and developing the

Final Strategic Plan and ensuring it is a clear, actionable document that includes timelines, responsible parties, and measures for ongoing evaluation.

As we finish with the **Final Presentation and Handover**, Studer Education will present, or support the steering committee with presenting, in the **Presentation to the Board** of the final strategic plan and performance scorecard for approval; **Documentation Handover** to provide all final documents, including the strategic plan and performance scorecard, in both electronic and print formats; and prepare for next steps in the implementation process to communicate and deploy the plan with a **Training Session** for staff on how to use and monitor the performance scorecard to ensure proper implementation by October 1.

This timeline chart with format and deliverables shows the implementation approach that we recommend for the MDE across a 6-month timeframe for Phase One: Strategic Plan Development.

Phase One Timeline	Format	Service Deliverables
Strategic Plan Development (Approximately April 2025 – October 2025, including final presentation and training by October 1; 6 Month Process)	On-Site	<ul style="list-style-type: none"> • 3 Quarterly (scheduled in format and cadence according to MDE’s needs) One-Day (8 Hour) Leadership Development Institutes and Strategy Sessions to work with steering committee and ELT to shape pillars and guide strategic planning process, including theme analysis and training with Studer Education coach
	Virtual	<ul style="list-style-type: none"> • Monthly 1-Hour One-on-One Coaching with State Superintendent or designee to ensure statewide alignment, provide progress updates on strategic planning process, and plan for Leadership Development Institutes and Strategy Sessions • Up to 1 Half-Day (4 Hours) per month during Strategic Planning Process with Steering Committee (scheduled in format and cadence according to MDE’s needs) to guide strategic planning process, analyze themes from focus groups, support creation of draft strategic plan, and help roll-out Strategic Plan by October 1 • 3 Days of Focus Groups, led by Coach and Steering Committee, with Key Stakeholders including: <ul style="list-style-type: none"> • 2 90-Minute Sessions with each stakeholder group below: <ul style="list-style-type: none"> ○ ELT and Board to shape mission, vision, and pillar goals for the MDE for next 5 years (or length of MDE’s desired visioning) ○ Legislative Representatives such as Speaker of the House, Lt. Governor, and Vice Chairs to bridge MDE and state legislative needs, and ensure plan buy-in ○ MEC and AccelerateMS to gain workforce development perspective and needs from Mississippi K-12 graduates ○ Community Colleges and IHL to gain higher education perspective and needs from Mississippi K-12 graduates

		<ul style="list-style-type: none"> • 1 Round of 30-Minute One-on-One Sessions Led by Coach with CEOs of 5 of Mississippi’s largest corporations to identify needs from K-12 graduates to be successful in most competitive workplace environments
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For another example of what the strategic planning timeline may look like, please see Figure 5.

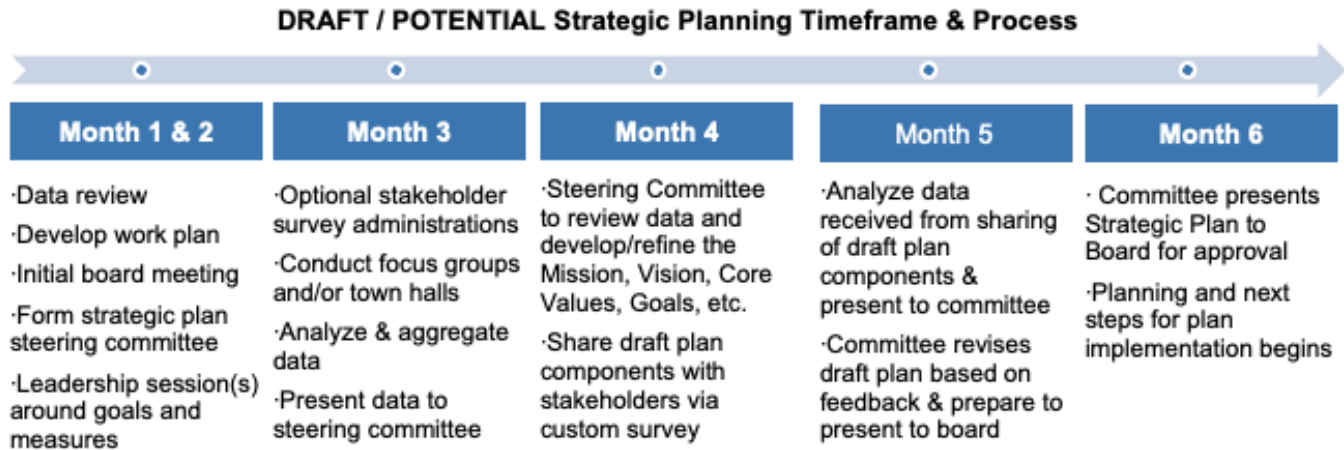


Figure 5. Strategic Planning Timeline and Process. *The MDE receives research- and evidence-based strategic planning support following a tailored timeline to meet your needs and address your priorities.*

Final deliverables include a strategic plan and performance scorecard draft and final strategic plan with pillars and goals based on focus groups and steering committee feedback, strategic plan survey(s) to guide the strategic plan, and launch and roll out of the strategic plan at a milestone (e.g. State Roadshow) alongside the MDE with guidance at and/or support from the Studer Education coaching team.

Expected outcomes include a community-informed, comprehensive strategic plan that can evolve to current and changing educational challenges, provide a clear roadmap for where the MDE will head next to serve its stakeholders and students, and engage the community in informing where the MDE and state educational landscape will head next.

Phase Two: Performance Scorecard Refinement and Implementation

The MDE seeks a partner that can revise the performance scorecard to visually track progress towards strategic goals, ensure goals are measurable and aligned with the organization’s mission, and identify or create systems for ongoing data collection to measure the effectiveness of strategies and track KPIs. We also recommend a 6-month process to support the Executive Leadership Team with the refinement and implementation of the performance scorecard through research- and evidence-based methodology, and align the scorecard KPIs to pillars in the strategic plan. The 6-month timeframe will allow for thoughtfully crafted KPIs and action steps based on the strategic plan to ensure strategic plan alignment, and result in a 1-year full strategic planning process.

Our performance scorecard process is designed as the second phase of the strategic planning process, aligned to Principle 2: Measures that Matter of the Nine Principles® of Organizational Excellence Strategic Priorities and Goals within the Evidence-Based LeadershipSM Framework. We design and implement scorecards to create accountability for the strategic plan and break the plan

into quarterly improvement cycles to track progress and course correct in real-time. The performance scorecard serves as a state report card to the legislation on progress to strategic plan goals.

Following the Strategic Plan Development, Phase Two is designed to leverage continuous improvement frameworks and tools to successfully deploy the new strategic plan and build leadership and organizational capacity to achieve results, focusing on the Performance Scorecard, through carrying out the **Implementation Roadmap**, developing further **Monitoring and Reporting Mechanisms**, and hardwiring **Review and Adjustment Protocol**. During this phase, we continue to work closely with the State Superintendent or Designee(s) in monthly 1-hour one-on-one coaching to ensure statewide alignment, provide progress updates on the scorecard, and plan for coaching with the Executive Leadership Team to guide statewide scorecard development, refine scorecard focuses based on the strategic plan as it makes sense, support creation of department scorecards, and provide additional training with strategies to launch the statewide scorecard with fidelity. In this phase, we will primarily work with the Executive Leadership Team responsible for executing the strategic plan.

This phase will expand on the **Implementation and Monitoring Plan** established in Phase One, beginning with the **Implementation Roadmap**. Through a 1-Day (8 Hour) Scorecard Retreat to refine the **Implementation Roadmap** and up to 1 half-day (4 hours) virtually per month to define the **Monitoring and Reporting Mechanism** and **Review and Adjustment Protocol**, as well as provide further **Training Sessions** for implementing the scorecard, we will focus on:

- Defining **Key Milestones** related to performance scorecard implementation and how to achieve Key Milestones and strategic goals
- Determining further **Task Breakdown** in implementing the performance scorecard for tasks specific to each milestone as it relates to achieving goals in the strategic plan
- Using the scorecard to detail **Resources and Support** needed to accomplish goals and solve for barriers to achieve the strategic plan goals
- Highlight **Dependencies**, if any, within the scorecard to achieve strategic plan goals
- Identify **Deliverables** and expected outputs for goals within the scorecard
- Refine **Performance Indicators** to measure success for goal milestones
- Establish a **Monitoring Frequency** as makes sense for the MDE such as 30-, 60-, and 90-day cycles of improvement and quarterly report outs to the State Board on progress
- Establish **Roles and Responsibilities**, including what department and individuals own what tasks, on the scorecard to achieve strategic goals and milestones
- Provide further **Training Sessions** to review and adjust the strategic plan and scorecard as needed to respond to changing conditions or emerging challenges, including establishing **Feedback Mechanisms** to collect and incorporate ongoing feedback related to achieving strategic plan goals and **Course Correction Plans** to determine how issues will be addressed if progress deviates from the roadmap

At the conclusion of Phase Two, we will complete the **Final Presentation and Handover** with **Documentation Handover** of all final documents, including also the implementation roadmap and monitoring plan, in both electronic and print formats.

State Board of Education Strategic Planning and Performance Scorecard

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This timeline chart with format and service deliverables shows the implementation approach that we recommend for the MDE across a 6-month timeframe for Phase Two: Performance Scorecard Refinement and Implementation.

Phase Two Timeline	Format	Service Deliverables
Performance Scorecard Refinement and Implementation (October 2025 – March 2026; 6 Month Process)	On-Site	<ul style="list-style-type: none"> • 1 One-Day (8 Hours) Scorecard Retreat with ELT to develop the implementation and further implementation training of the statewide scorecard
	Virtual	<ul style="list-style-type: none"> • Monthly 1-Hour One-on-One Coaching with State Superintendent to ensure statewide alignment, provide progress updates on scorecard development, and plan for Scorecard Retreat with ELT • Up to 1 Half-Day (4 Hours) per month during Scorecard Development with ELT (scheduled in format and cadence according to MDE’s needs) to guide statewide scorecard development, refine scorecard pillar goals and focuses based on the strategic plan, support creation of department scorecards, and provide training with strategies to launch the statewide scorecard with fidelity to guide the 25-26 school year

Final deliverables include a fully implemented statewide performance scorecard aligned to the strategic plan that can be public-facing and training for each MDE Department Chair to lead a strategic plan pillar and report out in, for example, a quarterly cadence to the state Board.

Expected outcomes include an implementation roadmap, monitoring and reporting mechanism through the performance scorecard, and advanced leadership capacity to implement the scorecard and align annual and short-cycle goals, behaviors, and processes to the strategic priorities to operationalize the plan.

Documented Past Performance

We provide strategic plan and performance scorecard facilitation, development, and implementations services to the majority of the 160+ educational organizations that we support each year for the past 15 years. Documented case studies and results of interest include:

- [**Building Bridges: A Superintendent’s Journey to Create a Community-Driven Strategic Plan**](#) – Superintendent Dr. Candace Pelt of Central Linn School District in Oregon highlights how the strategic planning process with Studer Education provided a roadmap for guiding decision-making and ensuring alignment with community values. She shares how the process aligned communication with pillars to provide a consistent narrative for staff, board members, and the community – and increased transparency with a public scorecard to share successes and challenges as well as built trust and a sense of collective responsibility.
- [**Mastering the Art of Reflection: A Superintendent’s Guide to Progress and Impact**](#) – Superintendent Mark Martin of Meade County Schools in Kentucky shares valuable insights into the strategic planning and progress monitoring practices he and his team have partnered with Studer Education on. Most recently, Superintendent Martin shared at the

What's Right in Education 2024 Conference how these efforts have resulted in the district's achievement gap being completely eliminated.

- **[Plan and Execute for Organizational Excellence](#)** – Superintendent Brian Sica of Banks School District in Oregon shares how he initiated the strategic planning process with Studer Education and began regularly implementing short cycles of improvement during his first year as superintendent. He answers how the strategic planning process established trust within the community, intertwined culture and strategy to support organizational success, and built trust and fostered professional growth within the leadership team.
- **[From First Year Scorecards to Achieving Alignment Across Departments](#)** – This article spotlights two California districts – Hemet Unified and Burton School District – featured at the Carnegie Summit for Improvement in 2024 and includes presentations on their scorecards, how they were developed, and results experienced. Results due to scorecard development and implementation include celebrating a 40% reduction in acts of student aggression and a 30% reduction in suspension incidents, math scores that surpass the state average, an increase in student enrollment, and schools improving their test scores.

For an example of a completed strategic plan, please see the University of West Georgia's Strategic Plan 2021-2026. The former University of West Georgia President who partnered with Studer Education to create the plan and current President Dr. Brendan Kelly of Arkansas State University System, which has partnered with Studer to create their strategic plan, also serves as a reference.

BECOMING UWG

STRATEGIC PLAN 2021–2026
Positioning UWG for Success in
the 21st Century



More than 1,300 members of the UWG community – students, faculty, staff, alumni, community leaders, boards, and other external stakeholders – took an active role in the university's strategic planning for the future.



1,300+
STAKEHOLDERS WHO PARTICIPATED



290
TOTAL DISCOVERY HOURS



Stakeholder input and analysis-produced themes

Steering team members identified a number of recurring themes during the Discovery Sessions. The following categories provide additional context, highlighting the diverse perspectives that emerged. The themes identified include:

IDENTITY

BELONGINGNESS

CONNECTEDNESS

RACE/DIVERSITY

ACADEMIC EXCELLENCE

PRIORITIES — COMMITMENT STATEMENT

Dedicating ourselves to the curation of a first-choice university.

Market analysis-informed value proposition and demand

A study led by Gallup and Purdue University found that just 3 percent of all college graduates say they had all six of the experiences – “The Big Six” – that strongly relate to whether they felt their colleges prepared them well for life.

Together, and individually, the Gallup-Purdue Index finds these six experiences have a greater effect on long-term life outcomes such as employee engagement and well-being — even more than the type of school these graduates attended (for example, public or private).

The “Big Six”

SUPPORT

- I had at least one professor who made me excited about learning.
- My professors cared about me as a person.
- I had a mentor who encouraged me to pursue my goals and dreams.

EXPERIENCE

- I worked on a project that took a semester or more to complete.
- I had an internship or job that allowed me to apply what I was learning in the classroom.
- I was extremely active in extracurricular activities and organizations.



STRATEGIC PRIORITY 1 Relevance

UWG will continue to evolve to be more relevant to students' needs (both inside and outside the classroom), as well as adapt to a changing world and economy.

- Update existing programs and develop new programs based on continuous market analysis in order to engage students and provide them with 21st century learning experiences.
- Launch or advance each students' career before graduation by ensuring they work on at least one meaningful project (experiential learning) that takes a semester or more to complete.
- Elevate ALL students' professional, cultural, and global competencies via co-curricular experiences.
- Leverage the geography of UWG to be an economic and intellectual engine for companies, communities, and organizations through talent-development and mutually beneficial partnerships.
- Define pathways to post-graduation through an institutional commitment to elevating and advancing internships, experiential learning, intentional mentorship, and professional and community-based networking for all students.



STRATEGIC PRIORITY 2 Competitiveness

UWG curates its operations around higher end-user expectations in order to emerge as the first choice for students, employees, employers, alumni, and supporters.

- Elevate institutional visibility and reputation by promoting the successes and contributions of students, faculty, staff, and alumni.
- Be distinct — design distinctive, world-class experiences inside and outside the classroom for all

who "Go West," differentiating ourselves from our peers and aspirants.

- Embed excellence in service — create remarkable experiences through proactive service excellence (everyone feels "expected").
- Recruit, hire, and continually develop a high-performing, diverse workforce.
- Implement a holistic, institution-wide integrated wellness framework to enhance the lives and performance of students, employees, and external communities we serve.
- Advance the front porch of the university by engineering the student athletic, artistic, and other externally facing (or audience-centered) experiences around a culture of excellence.
- Shape and deploy next-generation operating and service models emphasizing financial stability and wherewithal; focus on creating margin in our resources to facilitate investment in the "next."



STRATEGIC PRIORITY 3 Placemaking

A public university is a unique institution in the United States that has the capacity to provide a holistic "sense of place." UWG will live up to that expectation all the time.

- Strengthen the sense of belonging and connectedness at UWG by intentionally nurturing relationships and bonds among students, faculty, staff, alumni, and communities.
- Intentionally cultivate a safe and inviting environment that seamlessly integrates equitable principles in all institutional actions.
- Continuously elevate physical and digital spaces, presentation, and service to cultivate a clear, distinctive UWG identity and experience on campus and throughout the region.
- Cultivate traditions and experiences that people are eager to engage with and that enliven a sense of pride in being a part of the University of West Georgia.

What Does the Bullseye Represent?



EXPERIMENT & EXPLORE

- Interdisciplinarity
- Working to meet the needs and expectations of the future

ESTABLISH A BEACH HEAD

10-20 years of focused attention to become one of the top 20 public regional comprehensive universities in the United States

DOUBLING DOWN

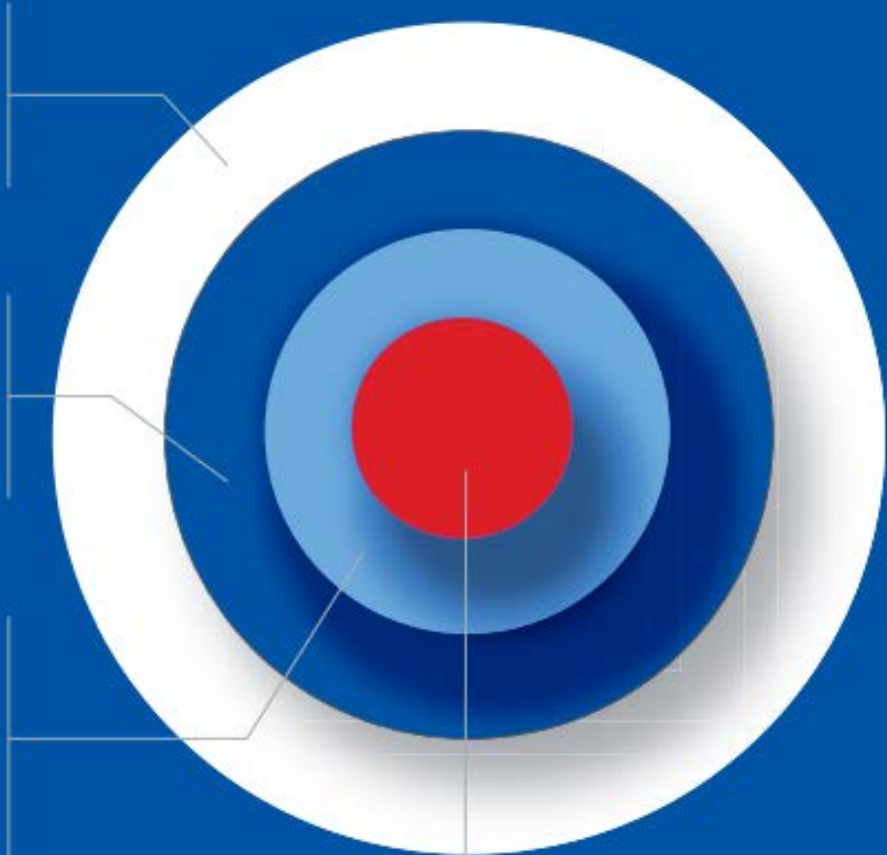
What do we need to do to take UWG from good to great?

- Service excellence
- University experience
- 21st century education

THE CORE

What do we have to win all the time?

- Recruitment
- Retention
- Graduation



westga.edu/becominguwg

COMPONENT 2 - ADMINISTRATION

Tab 2 – Resumes for Key Personnel

Our coach experts bring extensive backgrounds in K-12 public education as well as higher education institutions and have experience in managing similar strategic projects, with strong organizational and communication skills, a proven track record in strategic planning within the education sector for the strategic plans and scorecards we help 100+ education organizations create each year, skill in data analysis, expertise in developing KPIs and performance tracking systems, experience engaging diverse groups, and excellent writing and editing skills that include experience drafting professional documents.

With the MDE’s Contractor Prerequisites in mind, the MDE’s coaching team from Studer Education is:

- **Dr. Charlotte Boling (Coach Director and Team Lead)** – Dr. Boling will be the main service provider for the MDE, and will be responsible for delivering all services, both on- and off-site, in our work with the MDE.

Dr. Charlotte Boling

Post-doctoral Certificate, Specific Reading Disabilities, University of Florida
Ph.D. Curriculum and Instruction, University of Southern Mississippi
M.Ed. Instructional Technology, Johns Hopkins University
B.A. Elementary Education, University of Florida

Dr. Charlotte Boling brings decades of experience in continuous improvement, organizational efficiency, instructional enhancement, and student growth. In the K-12 arena, Charlotte served as a teacher, instructional coach, and district leader. Charlotte taught elementary students in the public schools of rural Florida, Georgia, and Maryland. Charlotte has held teaching positions with the Department of Defense Education Activity (DoDEA) overseas and stateside (Section 6). As a classroom teacher, Charlotte served as grade level chair, professional development provider, professional learning community (PLC) chair, and community liaison, among others. As a military spouse, most of Charlotte’s 12 years of classroom instruction was serving military-connected students and families. As an advocate of inclusion, Charlotte has worked with: the Collaboration for Effective Educator Development, Accountability, and Reform (CEEDAR) to support students with disabilities by improving teacher and leader preparation standards; Consortium for Overseas Student Teaching (COST) to provide opportunities for international teaching opportunities; and Military Child Education Coalition (MCEC) to provide educational support for military dependents and military-connected learners. Her higher education experience includes work as an associate professor, assistant dean, department director, and professional development designer. Charlotte works with school leaders to develop systems of high performance while ensuring student success. Charlotte is a designer of instruction for teachers and leaders. Her expertise in face-to-face and online instructional strategies positions her to be one of the best educators in designing research-based and applied training programs for teachers and leaders.

- **Dr. Reggie Todd (Coach Director)** – Dr. Todd will support Dr. Boling in delivering all services, both on- and off-site, in our work with the MDE.

Dr. Reggie Todd

EdD, Curriculum & Instruction, University of West Florida
EdS, Curriculum Studies, University of West Florida
Med, Secondary Education, University of West Florida
BS, Mathematics Education, Florida A&M University

Dr. Reggie Todd brings decades of experience in continuous improvement, employee engagement, instructional enhancement, and student growth. As a classroom teacher, Reggie held teacher-leader positions such as department chair, professional development provider, building association representative, and others. Reggie's post-secondary experience includes work as an associate professor, graduate programs coordinator, department chair, and faculty development director. As Graduate Programs Coordinator, Reggie was responsible for program admissions, student advising, quality and compliance of course curriculum, state requirements, and faculty selection. As Department Chair, Reggie led a team of faculty to enhance the undergraduate educator preparation program. He assisted with state approval and national accreditation of all educational programs including governance, curriculum, continuous improvement, resources, and success of the educational unit. As a Faculty Development Director, Reggie drove innovative course design, the support of high-impact practices, and other strategic initiatives to enhance the teaching pedagogies of university faculty. In addition to his university responsibilities, Reggie also contributed to several professional organizations through executive board service, publishing and presenting research. Reggie's alternative teacher certification work includes serving as an online instructor and faculty manager. Reggie led a team of faculty to develop online instructional content and other educator preparation support services to ensure teacher candidate success with certification examinations. As faculty manager, Reggie was responsible for curriculum development, student success, and program accreditation support.

- **Dr. Deanna “De De” Ashby (Senior Coach Director)** – Dr. Ashby will provide internal support and implementation guidance to help Dr. Boling in providing excellent service to the MDE.

Dr. Deanna “De De” Ashby

Ed.D., Educational Leadership, Oakland City University
Rank I, Secondary Guidance, Western Kentucky University
Master's Degree, Secondary School Guidance, Western Kentucky University
Bachelor of Science, Business & Marketing, Western Kentucky University

Dr. Deanna Ashby joined Studer Education in July 2021 as Leader Coach after retiring as the Superintendent of Hopkins County Schools, Kentucky, in June 2021. As a former four-year partner with Studer Education, the transition from superintendent to coach provided a smooth transition to work alongside partners with strategic planning, continuous improvement, development of leadership capacity, and building positive cultures to recruit and retain employees. Her five years, as superintendent, built a strong belief in education and her mission field. After working in public schools for 29 years, she considers education a calling that can have a positive impact on the community. That's obvious through her emphasis on Team Hopkins – One Team, One Mission, One Community. Dr. Ashby has served as a high school business and marketing teacher, guidance counselor, elementary and high school principal, and district administrator, all in Hopkins County Schools. She served as an educational consultant on the Kentucky Association of School Resource Officers board, served on the Commissioner of Education Superintendent Advisory Committee, and a mentor for Kentucky Women in Educational Leadership and Kentucky Association of School Administrators New Superintendent Onboarding Program.

- **Dr. Casey Blochowiak (Senior Coach Director)** – Dr. Blochowiak will assist Dr. Ashby to provide internal support and implementation guidance to help Dr. Boling in providing excellent service to the MDE.

Dr. Casey Blochowiak

Ph.D. Educational Leadership and Policy Analysis, University of Wisconsin - Madison
M.S. Administration, Concordia University
M.S. Literacy, Concordia University
Teaching Certificate - Educational and Policy Leadership Program, Marquette University

B.A. Political Science and History, Marquette University

Casey served as a district-level leader in the School District of Menomonee Falls (WI). She focused on the advancement of teaching and learning and the implementation of continuous improvement processes at the district and school levels (of which the School District of Menomonee Falls has received substantial national recognition and award). Casey was also a high school principal in the School District of St. Francis, an elementary school principal in the Mukwonago Area School District, and an associate principal at Menomonee Falls High School, all located in Wisconsin. Her career in education began as a high school social studies teacher and reading specialist. Casey continues to make a tremendous impact by engaging with school districts across the country in the implementation of EBL and continuous improvement practices to advance district priorities and achieve high-performing student and organizational outcomes.

- **Dr. Melissa Matarazzo (Chief Administrative Officer)** – Dr. Matarazzo will serve as an additional internal support resource to provide thought leadership guidance and implementation support to Dr. Boling in her work with the MDE.

Dr. Melissa Matarazzo, Principal

Ed.D. Urban Superintendents Program, Harvard University Graduate School of Education
Ed.M. Educational Policy & Management, Harvard University Graduate School of Education
Ed.M. School Leadership, Harvard University Graduate School of Education
B.A. History, Brown University
Educational leadership certification and licensure in Massachusetts and South Carolina

Dr. Melissa Matarazzo leads the Studer Education coaching team and serves as an expert coach/consultant. Before joining Studer, Melissa served as the executive director for achievement and accountability in the Charleston County School District in South Carolina, overseeing the offices of teacher effectiveness, leadership development, and assessment and evaluation. She was also a middle school principal in the Peabody (MA) Public Schools and an eighth-grade teacher and assistant principal in the Derry (NH) Cooperative School District. Melissa has served as a supervisor of teacher interns at the College of Charleston, SC, and an adjunct instructor at American International College in Springfield, MA.

Please see the following resumes included.

Charlotte J. Boling

5268 Crystal Creek Drive Pace, FL 32571

850.712.6147

cboling@bellsouth.net

Education and Certifications

Post-Doctoral Certificate

Cognitive Disabilities/Dyslexia, University of Florida, 2019

Ph.D. Curriculum and Instruction: Literacy and Instructional Design

University of Southern Mississippi, 2002

M.S. Instructional Technology

Johns Hopkins University, 1998

B.A. Elementary Education

University of Florida, 1983

Florida Department of Education,

Elementary Education K-6; Reading K-12, Certificate # 541553

Employment

Educational Consultant

Coach Director 2023 Studer Education LLC

Panhandle Area Educational Consortium 2008-2010

K-12 Public School

Literacy Coordinator 2020- 2023, Santa Rosa County Schools, Milton, FL

Responsible for district literacy curriculum, instruction, and assessment;
FDOE compliance, \$5,000,000 budget; 6+ FDOE grants; 32 personnel; curriculum adoption;
accreditation; K-12 administrator growth and development; teacher professional development

Literacy Coach 2016- 2020 Santa Rosa County School District, Milton, FL

Responsible for school curriculum, instruction, and assessment; teacher growth
and development; student reading disability diagnosis; school improvement plan;
accreditation

Teacher 2015, Santa Rosa County School District, Pace, FL (UWF Professional Development Leave)

Teacher 1997 - 1999, Anne Arundel County Schools, Annapolis, MD

Teacher 1995-1997, Liberty County School District, Hinesville, GA

Teacher 1992-1995, DODDS, Ft. Stewart, Hinesville, GA

Teacher 1987-1988 and 1989-1990, DODDS , Mainz, Germany

Teacher 1983 - 1987, Levy County School District, Williston FL

Higher Education

Literacy Matrix Facilitator, 2020, University of Florida

Curriculum and Assessment Reviewer; Navigator/Coach

Adjunct, 2020 University of Florida

2019, University of West Florida

Associate Professor, 2008 - 2016, University of West Florida

Educational Research and grants; Graduate and Undergraduate Course development and Instruction;
Advising; and Service to profession

Chair, Teacher Education & Educational Leadership, 2013-2014, University of West Florida

Leadership of 12 educational programs, 40 faculty, and 1000 students

Assistant Dean of Education and Accreditation, 2010-2013, University of West Florida

Responsible for national accreditation, state program approval and compliance, and institutional
review of all education programs; faculty growth and development; and student success

Associate Chair, Department of Education and Educational Leadership, 2008-2010

Responsible for state program approval; course schedule; recruitment and retention;

Assistant Professor, August 2003-2008, University of West Florida

Research Associate, August 2001-2003, University of West Florida

20A

REGINALD L. TODD, Ed.D.

2409 Webster Street ~ Houston, Texas 77003
850.554.3553 (cell) ~ rltodd84@yahoo.com

PROFILE

Creative and passionate educator with a proven ability to enhance students' performance, offering twenty years of varied instructional and administrative experience. Possess a positive, caring, and effective teaching style with the willingness to work above and beyond the call of duty.

EDUCATION

Doctor of Education, Curriculum & Instruction: Curriculum & Diversity Studies

Dissertation Title: *Teacher Care as Perceived by Students: A Phenomenological Study*
University of West Florida ~ Pensacola, FL December 2015

Specialist of Education, Curriculum & Instruction: Curriculum Studies

University of West Florida ~ Pensacola, FL December 2009

Master of Education, Curriculum & Instruction: Secondary Education

University of West Florida ~ Pensacola, FL December 2007

Bachelor of Science, Mathematics Education

Florida A&M University ~ Tallahassee, FL December 2005

EXPERIENCE

November 2022 – Present

Faculty Manager, TeacherReady ~ Studer Education | Huron Consulting Group ~ Pensacola, FL

Duties in addition to instructor activities:

- Assist in the revision of curriculum including the creation of modules and assignments
- Participate in weekly team and leadership team meetings representing instructors
- Participate in quarterly face-to-face Strategy Session meetings
- Serve as Moodle (Learning Management System) site administrator
- Serve as liaison between TR team and instructors
- Participate in continuous improvement activities that align with CAEP renewal

July 2016 – Present

Instructor, TeacherReady ~ Studer Education | Huron Consulting Group ~ Pensacola, FL

Duties:

- Facilitate multiple lessons (3, 4, and Benchmark) providing timely, authentic feedback
- Monitor weekly teacher candidate progression
- Assist teacher candidates with preparation for all subtests of FTCE via one-on-one sessions
- Developed study materials for GK-Math to support teacher candidates
- Complete Benchmark Disposition survey for each teacher candidate
- Complete Benchmark FEAPs survey for each teacher candidate
- Input and approve mentor teacher Benchmark Observation survey data
- Participate in CAEP renewal with UWF faculty

March 2024 – Present

Director, Teaching and Learning Excellence Center ~ Texas Southern University ~ Houston, TX

Duties:

- Partners with the Provost's Office, colleges, departments, and other units (ex., TSU Online) to achieve institutional strategic plan goals related to teaching and learning through faculty, instructional, and program development.
- Drives innovative course design, the support of High-Impact Practices, and other initiatives to support and advance strategic plan goals to enhance the teaching pedagogies of faculty.
- Work with Colleges, Schools, Departments, and other academic units to identify and address teaching and learning needs and opportunities as well as assist faculty to develop sound practice in their understanding and implementation of sound teaching-learning outcomes.
- Supports the adoption and use of evidence-based instructional strategies, educational technologies, and active learning spaces to enhance instruction, including management of specialized classrooms and implementation of faculty mini-grant programs that promote collaboration.
- Leads the assessment of Center activities, demonstrating impact internally and externally, via web presence, email, social media, and presentations to TSU Board of Regent and THECB; implements a continuous improvement process in partnership with the Office of Institutional Effectiveness.
- Manages all center operations, including its growth and supervision and budget planning and execution, which involves unit planning and procurement of funds through external grant submission and management.
- Formulate a process of selecting TLEC Fellows and managing their role to enhance the teaching and learning goals within their college and school.
- Assist in drafting policies and procedures related to teaching pedagogy.
- Supports TSU through institutional service on committees etc. related to teaching and learning; promotes TSU as an institution that prioritizes teaching excellence and student success through hosting regional events, partnering with regional institutions, and participating in the national educational development dialogue.
- Performs other job-related duties as assigned.

August 2019 – March 2024

Associate Chair, Department of Curriculum & Instruction ~ Texas Southern University ~ Houston, TX

Duties:

- Assist with curriculum development and revisions for the department.
- Develop course schedules that serve the program and student needs.
- Manage course registrations and adjunct instructor assignments.
- Review and revise department information published in the university catalog.
- Evaluate adjunct faculty performance.
- Recruit and retain students in the department's programs.
- Coordinate graduate student advising and degree audits.
- Evaluate graduate student transfer credit.

August 2016 – Present

Associate Professor of Curriculum & Instruction ~ Texas Southern University ~ Houston, TX

(Promoted from rank of Assistant Professor to Associate Professor with Tenure in August 2022)

Courses Taught:

Content Focused Teaching in Mathematics (EDCI 330)	Multicultural Education (EDCI 551)
Intro to Educational Psychology (EDCI 346)	Diversity in Education (EDCI 915)
Content Focused Teaching in Science (EDCI 402)	Urban Teaching Strategies (EDCI 932)

Effective Classroom Communication (EDCI 437)
Curriculum & Instruction (EDCI 540)
Classroom Management (EDCI 531)

Prep Educators Urban Schs (EDCI 983)
Practicum in C & I (EDCI 998)
Dissertation (EDCI 999)

August 2011 – July 2016

Assistant Professor of Mathematics ~ Pensacola State College ~ Pensacola, FL

(Promoted from rank of Instructor to Assistant Professor in May 2014 ~ Tenure granted in May 2016)

Courses Taught:

Developmental Mathematics I & II (MAT0018 & MAT 0028), College Success (SLS1101)

January 2006 – June 2011

Mathematics Instructor ~ Escambia County School District ~ Pensacola, FL

Courses Taught:

Algebra I, Algebra II, Geometry, Liberal Arts Mathematics, Pre-Calculus, Math for College Readiness

CERTIFICATES & ENDORSEMENTS

July 2005 – December 2020

Florida Department of Education ~ Professional Educator's Certification, Area: Mathematics: 6 – 12

PROFESSIONAL INVOLVEMENT

2013 – 2016 ~ Florida DOE's Office of Instructional Materials, Reviewer

Assist in the review of K-12 mathematical instructional material bids for state adoption

2012 – 2015 ~ Florida DOE's FTCE Item Validation Committee, Subject Area Expert

Responsible for validating each test item on the state's mathematics teacher certification exam

(Mathematics 6-12, Mathematics 5-9, GK Mathematics)

GRANTS

Minority Science and Engineering Improvement Program (MSEIP) funded by the U.S. Department of Education.

Project Title: *Precollege Program and Access to Careers in Engineering (PPACE)*

Funded Amount/Period: \$749,811 / Oct. 1, 2019 – Sept. 30, 2022

PUBLICATIONS

Robinson, M., & **Todd, R. L.** (2023). Teacher perceptions of tier 2 reading interventions. *Texas Educator Preparation Journal*, 7(1), 82-101.

Irving, M. & **Todd, R. L.** (2022). Strategies for systems change. In Smithsonian Institution, *Building networks & enhancing diversity in the k-12 stem teaching workforce* (pp. 19-27).

Newton, T., & **Todd, R. L.** (2020). Closing the achievement gap: Perspectives, practices, and strategies for success. *The Journal of the Texas Alliance of Black School Educators*, 5(1), 43-64.

Corbie-Archet, D., **Todd, R. L.**, & Haynes, I. (2019). The effects of the null curriculum on african american student engagement in academics. *The Journal of the Texas Alliance of Black School Educators*, 4(1), 46-55.

- Saha-Gupta, N., Song, H., & Todd, R. L. (2019). Universal design for learning (udl) as facilitating access to higher education. *Journal of Education and Social Development*, 3(2), 5-9.
- Todd, R. L., & Smith, J. D. (2019). Multicultural teacher education matters. *Journal of Research Association of Minority Professors*, 19(1).
- Davis, D. A., & Todd, R. L. (2018). Mathematics thinking in early learners through the lens of quality children's literature. *The National Journal of Urban Education and Practice*, 11(4), 146-151.
- Todd, R. L. (2018). Do your students know you care?: A phenomenological study of teacher care. *National Teacher Education Journal*, 11(3), 81-99.
- Todd, R. L. (2015). *Teacher care as perceived by students: A phenomenological study* (Doctoral dissertation, University of West Florida).

INVITED PRESENTATIONS/PANELS

- Todd, R. L., Jones, T., & Wright, C. (2023, June). *9% is Not Enough: Learning from Black STEM Educators*. Presented at Southeastern Regional Robert Noyce Conference. Mobile, AL.
- Todd, R. L. (2023, June). *Algebraic Thinking 101: A Continued Focus on Expressions & Equations*. Presented at Southeastern Regional Robert Noyce Conference. Mobile, AL.
- Todd, R. L. (2023, June). *Creating Mathematics Classrooms for All Learners*. Presented at Southeastern Regional Robert Noyce Conference. Mobile, AL.
- Todd, R. L., et. al. (2021, July). *Perspectives of Selected Institutions of Higher Education on K-12 STEM Teaching Workforce Diversity*. Held at Smithsonian Science Education Center's STEM Education Summit. Virtual.
- Todd, R. L. (2019, June). *Equitable Mathematics Instruction for All*. Presented at Southeastern Regional Robert Noyce Conference. Mobile, AL.
- Todd, R. L. (2019, June). *Algebraic Thinking: A Focus on Expressions & Equations*. Presented at Southeastern Regional Robert Noyce Conference. Mobile, AL.

PRESENTATIONS

- Todd, R. L. (2022, April). *Purposefully Educating All Children Everyday (PEACE) in Mathematics*. Presented at Louisiana Chapter of National Association for Multicultural Education Conference. New Orleans, LA.
- Todd, R. L. (2021, February). *Creating Mathematics Classroom for ALL Learners*. Presented at the National Council of Teachers of Mathematics Conference. Virtual.
- Lewis, D., & Todd, R. L. (2021, February). *Multicultural Pedagogy: Best Practices*. Presented at the Texas Chapter of the National Association for Multicultural Education Webinar Series. Virtual.
- Todd, R. L. (2019, July). *Equitable Mathematics Instruction for All*. Presented at the Conference for the Advancement of Mathematics Teaching. San Antonio, TX.

- Todd, R. L., Turner-Moore, S., & Lindsey, J.** (2019, April). *Building Bridges for Social Justice*. Presented at the Texas Chapter of the National Association for Multicultural Education 18th Annual Conference. Nacogdoches, TX.
- Todd, R. L.** (2019, March). *Power & Privilege: How Do You Use Yours?* Presented at American Association of Blacks in Higher Education Conference. Indianapolis, IN.
- Todd, R. L.** (2019, February). *Mathematics Instruction for All*. Presented at the National Association of African American Studies & Affiliates Joint National Conference. Dallas, TX.
- Benjamin, R. J., & Todd, R. L.** (2019, February). *Influencing Factors of African American Males Retention in Post-Secondary Education*. Presented at the 38th Annual RAMP Conference. New Orleans, LA.
- Todd, R. L.** (2019, February). *Mathematics Instruction for All: A Focus on Mathematics Teacher Education*. Presented at the 38th Annual RAMP Conference. New Orleans, LA.
- Gonzales, D., & Todd, R. L.** (2018, June). *The Conceptualization of Mathematical Thinking in Early Learners through the Lens of Quality Children's Literature*. Presented at TSU-COE's Impact on Student Learning and Development Conference. Houston, TX.
- Todd, R. L., & Smith, J. D.** (2018, March). *Preparing Culturally Responsive Teachers*. Presented at American Association of Blacks in Higher Education Conference. New Orleans, LA.
- Todd, R. L., & Smith, J. D.** (2018, February). *Teacher Education Programs: Preparing Culturally Responsive Teachers*. Presented at the 37th Annual RAMP Conference. Nashville, TN.
- Davenport, E., Robinson, M., & Todd, R.** (2017, November). *Race and Inequality in Florida: The FAMU-Engineering College*. Presented at NAAAS & Affiliates' Sino-American International Research Conference. Tallahassee, FL.
- Powell, K. D., & Todd, R. L.** (2017, July). *Culturally Responsive Teaching: Educating with Diversity in Mind*. Presented at BCU-COE's 3rd Annual Educational Justice Conference. Orlando, FL.
- Todd, R. L.** (2017, July). *Do Your Students Know You Care?: A Discussion of Teacher Care*. Presented at BCU-COE's 3rd Annual Educational Justice Conference. Orlando, FL.
- Davis, D. A., Haynes, L., Pannell, S., & Todd, R. L.** (2017, July). *Literacy Strategies for Improving Mathematics: Developing Autonomous, Self-Directed Learners*. Presented at the ILA 2017 Conference & Exhibits. Orlando, FL.
- Smith, J. D., & Todd, R. L.** (2017, June). *Using Video Feedback to Prepare Future Teachers*. Presented at TSU-COE's Impact on Student Learning and Development Conference. Houston, TX.
- Todd, R. L.** (2017, February). *Excellence with Caring: Using Teacher Care as a Best Practice*. Presented at the 36th Annual RAMP Conference. Atlanta, GA.
- Todd, R. L.** (2017, February). *Using Teacher Care as a Best Practice*. Presented at the National Association of African American Studies & Affiliates Joint National Conference. Dallas, TX.
- Todd, R. L.** (2016, November). *Using Assessment Results*. Presented at Studer Education's StayReady Lab

Webinar. Pensacola, FL.

Todd, R. L. (2016, November). *What is APA and How to Use It?* Presented at the C&I's Graduate Symposium 2016. Houston, TX.

Todd, R. L. (2016, July). *Teaching To and Through the Student.* Presented at The Florida College System's Master Teacher Seminar. Pensacola, FL.

Todd, R. L., & Powell, K. (2015, December). *Culturally Responsive Teaching: Educating with Diversity in Mind.* Presented at Pensacola State College's Fall Institute. Pensacola, FL.

Todd, R. L. (2015, August). *Exploring the Spirit of Teaching.* Presented at Pensacola State College's Faculty Convocation. Pensacola, FL.

SERVICE

Departmental Service

- Serve as an undergraduate advisor for Math 4-8 and Science 4-8 majors (2016 - present)
- Serve as a master level advisor for all Curriculum & Instruction majors (2016 - present)
- Serve as a doctoral level advisor (2017 - present)
- Serve as a member of the Graduate Committee (2016 - present)
- Serving as chairperson of Graduate Committee (2019 - present)
- Serve as a member of the Clinical Practice Admissions Review Committee (2016 - present)
- Serve as a member of the Educator Preparation Admissions Review Committee (2016 - present)

College Service

- Serve as chairperson of CAEP Disposition Committee
- Serve as chairperson of CAEP Diversity Committee
- Serve as a member of the college's accreditation committee
- Serve as a member of the Teacher Education Council
- Serve every semester as a proctor for the Doctoral Comprehensive Examinations
- Presenter for Clinical Teaching II Professional Development Day (2016 - 2019)

University Service

- Serve as a member of the UPHI2 Education and Workforce (2020 - present)
- Serve as a member of the Graduate School's Faculty Council (2016 - present)
- Serve as a University Commencement Marshal (2017 - present)
- Contributor to Education Reform Research Project (2016)

Academy Service

- Serve as a reviewer for the Journal of the Texas Alliance of Black School Educators (2020-2021)

Directed Student Learning: Dissertation Committees

- Desna McDonald (chair) - 2023 - *Teachers' Perceptions of Blended Learning in Middle School Classrooms*
- Marlena Robinson (chair) - 2022 - *Teacher Perceptions of Tier 2 Reading Interventions*
- Juan Li - 2022 - *A Perception of International Graduate Students on the Academic Advising Support*
- Scholastica Turner-Moore - 2022 - *The Impact of Teachers' Social Emotional Competency and Reading Pedagogy on the Emergent Literacy of Children in Early Childhood Classrooms*
- Jeffery Lindsey - 2021 - *The Predictability of Types of Mentoring Relationships on the Perceived*

Performance Behaviors of College Undergraduate Students

Patricia Jackson – 2020 – *The Predictability of Demographic Academic Factors on the Career Decision Making and Self-Efficacy of African American Freshman College Students*

Amber Adams – 2018 – *The Impact of Technology Expenditures on the Academic Achievement of Elementary School Students*

Professional Organizations

- 2018 – Present Texas Council of Teachers of Mathematics, Member
- 2016 – Present Research Association of Minority Professors, Member
 - Serving as President-Elect, 2023-2025
 - Serving as Recording/Corresponding Secretary, 2019-2023
- 2016 – Present Texas Alliance of Black School Educators, Member
- 2002 – Present National Council of Teachers of Mathematics, Member
- 2006 – 2016 National Education Association, Member
- 2006 – 2016 American Federation of Teachers, Member
- 2011 – 2016 Pensacola State College Faculty Association, At-Large Member
- 2011 – 2016 United Faculty of Florida, Member
 - Served as Faculty Senator, 2012-2014
- 2011 – 2016 Florida Developmental Education Association, Member
- 2011 – 2016 National Association of Developmental Education, Member
- 2006 – 2016 Florida Education Association, Member
 - Served as Governance Board Member, 2009-2011

COMMUNITY INVOLVEMENT

- 2017 – Present ~ Wheeler Avenue Baptist Church, Member
 - Serving as a member of the Tutoring Ministry, 2020 – present
- 2006 – Present ~ Kappa Alpha Psi Fraternity, Inc., Life Member
 - Serving as member of Guide Right Committee for Houston Alumni, 2018 – present
 - Served as Vice Polemarch for Pensacola Alumni, 2014 - 2016
 - Served as Keeper of Exchequer for Pensacola Alumni, 2008 - 2014
 - Served as Director of Guide Right for Pensacola Alumni, 2006 - 2008
- 2005 – Present ~ FAMU National Alumni Association, Life Member
 - Served as Chapter President for the Pensacola Chapter, 2014 – 2016
 - Served as Chapter Vice President for the Pensacola Chapter, 2010 - 2014
- 2003 – Present ~ National Association for the Advancement of Colored People, Life Member
- 2012 – 2014 ~ Big Brothers Big Sisters of Northwest Florida, Mentor
- 1984 – 2016 ~ St. John Divine Missionary Baptist Church, Member
 - Served as an Academic Tutor, 2006 - 2016

AWARDS & HONORS

- 2022 Outstanding Research Award ~ Texas Southern University, Houston, TX
- 2018 JV Educational Leadership Award, Houston, TX
- 2011 Rising Star ~ Independent News, Pensacola, FL
- 2010 Educator of the Year Award ~ Pensacola Alumnae Chapter of Delta Sigma Theta Sorority, Inc.
- 2010 Top 5 Finalist for District Teacher of the Year ~ Escambia County School District, Pensacola, FL
- 2009 Teacher of the Year ~ Booker T. Washington High School, Pensacola, FL

Dr. Deanna D. Ashby

Senior Director of Coaching, Studer Education

Contact Information

6040 Island Ford Road
Hanson, KY 42413
C: 2703392737
ashby.deanna@gmail.com



Doctorate in Education Leadership

School of Education, Oakland City University, Oakland City, Indiana, December, 2019

Dissertation: *School Safety: Building Relations Between District Leadership and School Resource Officers*

Education

Professional Certificate for School Superintendent
Western Kentucky University, Spring 2001
Level I & II Principalship (9-12)
Western Kentucky University, Spring 2000
Endorsement in Principalship (K-8)
Western Kentucky University, December 1999
Rank I, Secondary Guidance (7-12)
Western Kentucky University, December 1997
Endorsement for Teaching Business Education in the Middle Grades (5-6) Murray State University, July 1994
Master's Degree, Secondary School Guidance (7-12)
Western Kentucky University, July 1993
Marketing Endorsement
University of Kentucky, July 1993
Bachelor of Science Degree, Business Education (7-12)
Western Kentucky University, May 1988

Experience

Senior Director of Coaching, Studer Education,
Pensacola, FL July 2021-Present
Superintendent, Hopkins County Schools,
Madisonville, KY July 2016-2021
Assistant Superintendent, Hopkins County Schools,
Madisonville, KY July 2013-June 2016
High School Principal, Madisonville North Hopkins High School,
Madisonville, KY July 2009-June 2013
Director of Secondary Instruction, Hopkins County Schools,
Madisonville, KY July 2008-June 2009
Elementary Principal, Hanson Elementary School,
Hanson, KY October 2001-June 2008
Assistant Principal, Madisonville North Hopkins High School,
Madisonville, KY July 1998-October 2001
Guidance Counselor, Madisonville North Hopkins High School,
Madisonville, KY August 1995-June 1998
Business/Marketing Teacher, South Hopkins High School,
Nortonville, KY July 1992-July 1995

Casey M. Blochowiak, Ph.D.

2715 E. Elizabeth Ave, St. Francis, WI 53235

(414)-803-0531

blochca2715@gmail.com

EDUCATION

University of Wisconsin - Madison, Madison, WI

Doctoral Program

Educational Leadership & Policy Analysis, September 2016 - December 2021, GPA 4.0/4.0

Concordia University, Mequon, WI

Masters of Science in Education

Literacy, September 2008 - May 2010, GPA 4.0/4.0

Administration, March 2012 – June 2013, GPA 4.0/4.0

Marquette University, Milwaukee, WI

Teaching Certificate, Educational & Policy Leadership Program, May 2006, GPA 4.0/4.0

Bachelor of Arts in Political Science and History, May 2002, GPA 3.7/4.0

PROFESSIONAL EXPERIENCE

May 2022 - Current **Huron|Studer Education**, Pensacola, FL

Senior Director of Leader Coaching, Full-time

- Execute a systems improvement approach with partners to achieve at the highest levels
- Coach leaders to focus on people, culture, strategy, execution, and results
- Develop aligned strategic direction and implementation systems and processes that empower people to execute on strategy
- Integrate improvement practices to turn around under-performing schools, departments, and districts
- Collaborate with executive leaders to establish annual goals and a project cadence to support execution
- Team leadership including supervision and evaluation

July 2018 - May 2022 **School District of Menomonee Falls**, Menomonee Falls, WI

Director of Curriculum and Learning, Full-time

- Annual development, implementation, and monitoring of professional development plan
- Project management related to instruction, curriculum development, and implementation
- Development and monitoring of professional coaching structure from teachers to executive leaders
- Oversight of learning management system for 4,000+ students used by 300+ teachers
- Development of fully-virtual and hybrid learning instructional models
- Implement Improvement Science methodology to drive academic achievement
- Assist in the development, implementation, and monitoring of staff evaluation system
- Facilitation of Board of Education work in committee structure
- Implementation and oversight of summer school for approximately 1,600 students
- Use of user survey data (parents and colleagues) to improve culture of service
- Management of approximately \$900,000 annual budget
- District policy revision and recommendation to the Board of Education

PROFESSIONAL EXPERIENCE (continued)

July 2016 - June 2018 **St. Francis High School**, St. Francis, WI
Principal, Full-time

- Supervision and evaluation of teachers and non-certified staff
- Creation of annual school goals in 45-day plan cycles
- Implementation of universal screener in Math and Reading
- Refinement of Student Support Team process
- Leadership in Continuous Classroom Improvement implementation
- Creation and support of Literacy Coaching cycles
- Weekly Professional Development Sessions
- Communication with students, staff, school board and community
- District level leadership - Effectiveness Project Implementation Coach, Math Curriculum Alignment, Instructional Framework and Adult Learning Framework Development

August 2014–June 2016 **Rolling Hills Elementary School**, Mukwonago, WI
Principal, Full-time

- Supervision and evaluation of teachers and non-certified staff
- Recruitment and selection of staff
- Ensure consistent implementation of curriculum
- Maintenance of a safe environment for students and staff
- Creation of school goals and led work towards achievement of goals
- District level leadership – Language Arts Curriculum Team

July 2013- July 2014 **Menomonee Falls High School**, Menomonee Falls, WI
Associate Principal, Full-time

- Supervision and evaluation of teachers and non-certified staff
- Maintenance of a safe environment for students and staff that promotes effective instruction • Consistent and equitable application of behavior matrix
- Collection and analysis of data to ensure achievement for all students
- Assists in the creation of school goals and engages and supports staff in working towards achievement of goals
- Communication with students, staff, school board and community
- Assists in the supervision of school events
- Leadership in the areas of Literacy, Response to Intervention, Positive Behavioral
- Interventions and Support, Collaborative Support Team

Aug 2007 – June 2013 **Mukwonago High School**, Mukwonago, WI
Reading Specialist and Social Studies Instructor, Full-time
Reading Department Chair
RISE Program Coordinator

Sept 2004 - 2012 **Educational Opportunity Program**, Marquette University, Milwaukee, WI
Pre-College Program Instructor, Sophomore Teaching Team Lead Instructor

Aug 2006 - June 2007 **Nova High School**, Milwaukee, WI
Social Studies Instructor, Full-time

ADDITIONAL TRAINING

200-Hour Yoga Teacher Training, June 2022
Project Management, April 2019
Six Sigma for Education (Orange Belt), October 2018
School Administrators Institute for Transformational Leadership (SAIL), June 2016
Improvement Science Workshop, June 2014
Educator Effectiveness Project (CESA 6) Calibration, June 2014
Restorative Practice, January 2014
Continuous Classroom Improvement, September 2013
Teachscape Certification, September 2013
Project CRISS District Trainer, June 2010
Professional Development Plan (PDP) Team Training, October 2010
AdvancED Accreditation Chair Training, October 2010

PROFESSIONAL AWARDS

2010-2011 Mukwonago Area School District 7-12 Specialty Educator of the Year Award

COURSES TAUGHT

Fall 2015 “Issues, Perspectives and Directions: A Professional Seminar in Education” University of Wisconsin
– Whitewater, MASD Master’s Program, Co-Teacher Mary Koski

COMMUNITY VOLUNTEER WORK

2016 Eagle Library Board, Eagle, WI
2011 – 2013 Saint Francis 4th of July Committee, Secretary

PUBLICATIONS

Walter, S., Blochowiak, C., & Habib, A. (2023). Achieving results in challenging times: how hardwired improvement practices increased student performance post-COVID. Preventing School Failure: Alternative Education for Children and Youth, 67(3), 141–144. <https://doi.org/10.1080/1045988X.2023.2204865>

“Connecting the Brain through Pattern Puzzles”, Comments from CRISS, Co-Author, N. Marble (Winter 2011)

Melissa F. Matarazzo

30 Nettlecreek Rd.
Fairport, NY 14450

978.518.0956

Email: uspmatarazzo@gmail.com

EDUCATION

2014

Doctor of Education, Urban Superintendents Program

Harvard University Graduate School of Education

- GPA: 4.0
- Earned Massachusetts Superintendent/ Assistant Superintendent Licensure, all levels
- Teaching Assistant in “Strategic Reform for Urban School Districts and Schools” with Thomas Payzant and “Strategic Management for Public Purposes” with Harry Spence

2010

Master of Education, Education Policy and Management

Harvard University Graduate School of Education

- Course work in instructional leadership, district-wide reform, adult development, qualitative and quantitative research
- Field research on school closures performed for Boston Public Schools
- School walkthrough reports prepared for Boston and Cambridge Public Schools

2005

Master of Education, School Leadership

Harvard University Graduate School of Education

- Earned Massachusetts Principal/ Assistant Principal Licensure, grades 5-8
- Course work in teacher evaluation, inclusive education, school reform, school finance, and instructional leadership

1998

Bachelor of Arts, History

Brown University

- Honored as magna cum laude graduate with GPA of 3.8
- Received Community Partnership and Public Service Award
- Obtained Rhode Island teaching certification in Social Studies, grades 7-12

1993-1994

Wellesley College

- Awarded First Year Distinction for GPA of 3.7

PROFESSIONAL EXPERIENCE

2014-present

Leader Coach

Studer Education, Pensacola, FL

- Coach boards of education, superintendents, district leaders, principals and assistant principals in the Evidence-Based Leadership Framework to accelerate continuous improvement. Tactics include strategy development, execution, and adjustment sessions with the district leadership; short cycle goal-setting and adjustment processes; effective communication strategies; performance management; delivering service excellence; and improving operational and instructional outcomes.
- Provide strategic planning facilitation, including stakeholder engagement and data analysis
- Received Studer Group Pillar Award in October, 2015; January, 2017

2007-2014

Educational Consultant

Studer Education, Pensacola, FL

Boston Public Schools, MA

KIPP Jacksonville, FL

20M

StuderEducation

Harvard Graduate School of Education (HGSE)
Charleston County School District, SC
Peabody Public Schools, MA
Amesbury Public Schools, MA

- Studer Education: Research fellow completing a qualitative survey of school and district leaders evaluated according to new, results-based models. Supporting Studer Education initiatives through document editing, discussion and strategy planning, researching specific topics, writing blog posts, teaching in the TeacherReady program, and facilitating field placements for TeacherReady participants.
- Boston Public Schools: Wrote Innovation School Proposal for Henderson K-12 Inclusion School. Wrote TIME Collaborative Extended Learning Time Proposal for the Young Achievers K-8 Pilot School. Designed teacher professional development for Summer Institute at Mattahunt Elementary School, a turnaround school
- KIPP Jacksonville: Coaching leadership development with 5 aspiring school leaders at KIPP Impact (Grades 5-8) and KIPP Voice (Grade K) and facilitating the AdvancEd school accreditation process at both schools
- HGSE: Facilitated small group discussions and personal reflection among school leaders at Programs in Professional Education including “The Art of Leadership” and the “Leadership Institute for Superintendents”
- Charleston County School District: Served as superintendent’s liaison on land/property issues; facilitated implementation of school quality reviews; member of Senior Leadership Team and Superintendent’s Cabinet
- Peabody Public Schools: Mentored middle school principal through induction into new role
- Amesbury Public Schools: Developed and facilitated adoption of new middle school master schedule

July, 2011-Feb., 2013 **Executive Director, Achievement & Accountability**

Charleston County School District, SC

- Led Teacher and Leadership Development through Induction/Mentoring, Teacher Evaluation, Incentive Pay Pilot Program, and Principal Preparation Pipelines and Professional Development
- Supervised Office of Assessment and Evaluation, including analysis, and interpretation of state testing results, AYP results, and State Report Cards
- Reviewed and approved requests to conduct research in school district
- Facilitated Teacher Incentive Fund grant proposal process that secured \$23.7 million for CCSD
- Member of Student Achievement Team and Senior Leadership Team

July, 2010-Jan., 2011 **Intern to the Superintendent**

Charleston County School District, SC

- Mentored by Dr. Nancy McGinley in preparation for superintendent’s licensure
- Developed and facilitated implementation of school quality reviews
- Assisted in the development of measurable, annual improvement targets for district’s strategic plan

2005-2009

Principal

J. Henry Higgins Middle School, Peabody, MA

- Led instruction for Massachusetts’s largest middle school with 1500 students in grades 6-8
- Evaluated and coached 150 staff, including 4 assistant principals, 100 teachers, 21 paraprofessionals, and additional support staff
- Developed and managed school budget of approximately \$5.5 million
- Oversaw annual school improvement planning that included new master schedule, restructuring of special education delivery, creation of core values and school mission statement, implementation of formative assessment system, integration of online grading and communication, and development of individualized and collaborative goal setting by staff
- Hired and inducted 13-35 new staff annually, due to significant retirement
- Organized professional development offerings for teachers: 3 full days and 4 half days each year

2007

Adjunct Professor

American International College, Springfield, MA

- Taught “Introduction to School Administration” course in cohort-based Masters’ program in Peabody, Massachusetts

2004-2005

Principal Intern

James P. Timilty Middle School, Boston, MA

- Participated in developing the Whole School Improvement Plan and Individual Student Success Plans
- Assisted administrative team with standardized assessments, event planning, written communication with the school community, grant application process, budget planning, and teacher supervision

2002-2004

Assistant Principal

Gilbert. H. Hood Middle School, Derry, NH

- Managed discipline for 930 students
- Participated in teacher hiring, induction, and supervision
- Curriculum leader for Social Studies, Science, and Language Arts
- Administrative coordinator of professional development
- Building coordinator for Section 504 Accommodation Plans

2000-2002

Social Studies, Spanish Teacher

8th Grade Team Coordinator

Gilbert H. Hood Middle School, Derry, NH

1998-2000

West Running Brook Middle School, Derry, NH

- Instructed 8th grade students in U.S. History, Spanish I
- Coordinated 8th grade team of teachers, including parent communication, student discipline, interdisciplinary curriculum, and new teacher mentoring; member of School Leadership Team
- District Social Studies Curriculum, Professional Development Committee member, Derry Education Association Building Representative
- Newspaper Club advisor, History Club leader, Soccer Coach

Tab 3 – References

Appendix C - References

Client Name	Oxford School District
Contact Name and Title	Bradley Roberson, Superintendent
Contact Address	200 Bolt Boulevard, Oxford, MS 38655
Contact Telephone Number	(662) 234-3541
Email Address	wbroberson@oxfordsd.org
Type of work provided to the client	Strategic Plan Development, Performance Scorecard Development and Implementation, and Organizational Excellence Coaching
Effective contract dates for the time frame services were/are being provided to client	July 2021-present - Performance Scorecard Development and Implementation since approx. July 2021 - Strategic Plan Development approx. March 2024-September 2024

Client Name	University of West Georgia / Arkansas State University System
Contact Name and Title	Dr. Brendan Kelly, Former President of University of West Georgia and Current President of Arkansas State University System
Contact Address	501 Woodlane Drive, Suite 600, Little Rock, AR 72201
Contact Telephone Number	(678) 839-4766
Email Address	bkelly@asusystem.edu
Type of work provided to the client	University of West Georgia: Strategic Plan Development, Performance Scorecard Development and Implementation, and Organizational Excellence Coaching Arkansas State University System: Strategic Plan Development
Effective contract dates for the time frame services were/are being provided to client	University of West Georgia: January 2014-present - Strategic Plan and Performance Scorecard Development and Implementation: approx. August 2020 - February 2021 Arkansas State University System: December 2024-May 2025

Client Name	South Louisiana Community College
Contact Name and Title	Dr. Vincent June, Chancellor
Contact Address	320 Devalcourt Street, Lafayette, LA 70506
Contact Telephone Number	(337) 521-9000
Email Address	vincent.june@solacc.edu
Type of work provided to the client	Strategic Plan Development, Performance Scorecard Development and Implementation, and Organizational Excellence Coaching
Effective contract dates for the time frame services were/are being provided to client	2015-present - Strategic Plan and Performance Scorecard Development and Implementation: most recent approx. February 2021-July 2021

COMPONENT 3 – PRICE

Tab 4 – Price/Budget

Appendix I – COST DATA/BUDGET

The vendor should refer to [Section 2.3 Deliverables](#) and provide line-item cost detail for all deliverables identified.

Attach Excel spreadsheet if necessary.

Project Work Plan	\$3,135.00	Final Strategic Plan and Performance Scorecard	\$7,053.75
SWOT Analysis and Environmental Scan Report	\$12,540.00	Final Presentation and Training by August 1	\$9,405.00
Stakeholder Engagement Plan	\$18,810.00	Implementation Roadmap	\$15,675.00
Draft Strategic Plan and Performance Scorecard	\$7,053.75	Monitoring and Reporting Protocols	\$14,107.50

Although our costs are outlined by individual deliverables, they are structured to be provided as a comprehensive package, ensuring the achievement of the proposed outcomes.

Total cost, inclusive of all travel, expenses, and fees: \$87,780

COMPONENT 4 - OTHER

Tab 5 – Any additional relevant information

While relevant implementation training will be included in requested one year, two-phase approach, we would also recommend for the MDE's consideration an optional multi-year organizational excellence coaching partnership following the conclusion of the first year that guides organizations on the Evidence-Based LeadershipSM Framework to align goals, behaviors, and processes from the strategic plan and all Nine Principles[®] of Organizational Excellence leaders must display to execute the plan with fidelity. The coaching is designed to develop the state Executive Leadership Team to execute and achieve strategic goals as well as set standards and serve as an example to Mississippi districts and other state departments for K-12 excellence.

K-12 organizations that have received strategic planning, performance scorecard, and organizational excellence coaching have received results such as (1) **Birmingham City School District** in Alabama which **eliminated 17 of the district's 22 F-rated schools, increased overall scores in 29 schools, improved employee engagement scores, instilled confidence in the community resulting in a nearly 90% vote to renew taxation for the district, and overcame status as an underperforming district** and (2) **Burton School District** in California sought Studer Education's coaching and support to create a plan of strategic excellence that included implementing innovative ways to teach math skills. The district now boasts **math scores that surpass the state average, saw an increase in California college acceptances – from 45% in 2015 to 70% in 2020, an increase in student enrollment, and schools improved their test scores.**

Components of the organizational excellence coaching that we would recommend include but are not limited to:

- **Virtual Coaching/Planning Sessions** with the State Superintendent or designee to discover state priorities and updates, align coaching to MDE needs, and plan for coaching activities within broader team(s)
- **Virtual or On-Site Quarterly Strategy Sessions** with the Executive Leadership team or a subset defined by the State Superintendent to set annual, measurable outcomes and strategies with the performance scorecard, monitor progress toward annual goals at specific points throughout the year, and review data to identify potential adjustments to make
- **Virtual or On-Site Annual Leadership Development** with leaders designated for the coaching to reflect on prior learning and practice; receive learning, practice, and guided feedback on new tactics for implementation; and clear expectations for independent practice following the session
- **Virtual or On-Site Individualized Coaching (one-on-one or team)** with leader or teams specifically identified for support by State Superintendent to identify learning goals, provide coaching and guidance, and foster reflection as well as provide clear expectations for independent practice following each session

The final deliverables include more fully cascading the performance scorecard to the individual department level; developing Standards of Excellence to ensure statewide alignment and execute

State Board of Education Strategic Planning and Performance Scorecard

Mississippi Department of Education

the strategic plan with fidelity from a culture lens; performance coaching; teaching survey roll-out and rolling-out results to the community; and hardwiring strategies for service excellence, rounding, and effective communication, among areas, to support the implementation of the strategic plan with fidelity and build strength of MDE team members to execute the strategic plan, from both a strategy and culture standpoint.

The cost for organizational excellence coaching for further strategic plan implementation and leadership capacity building to take place after the 1 year, 2-phase approach requested in the RFP would start at an estimated \$63,000 per year, which includes the option for both on-site and virtual support.

Tab 6 – Signed Contingent Fee/Acknowledgement of Amendments

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Contractor's bid or proposal.

REPRESENTATION REGARDING GRATUITIES: The Offeror represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 6-204 (Gratuities) of the Mississippi Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations. 3.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a bid, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror's bid or proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY

Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Melissa Matarazzo

Title: Chief Administrative Officer

Signature:  Date: 1/29/2025

Modifications or additions to any portion of this document may be cause for rejection of the bid

Appendix G – RELEASE OF PROPOSAL AS PUBLIC RECORD

Offerors **shall acknowledge** which of the following statements is applicable regarding release of its proposal as a public record. *An Offeror may be deemed non-responsive if the Offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.*

Choose one:

Along with a complete copy of its proposal, Offeror has submitted a second copy of the proposal in which all information Offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the *PPRB OPSCR Rules and Regulations* if the MDE or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Mississippi Code Annotated §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that the MDE may release the redacted copy of the proposal at any time as a public record without further notice to Offeror. An Offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by the MDE at any time without notice to Offeror. The proposal contains no information Offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Mississippi Code Annotated §§ 25-61- 9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its bid as provided in Mississippi Code Annotated § 25-61-9(1)(a). An Offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Appendix H – CONTRACTS

The prospective contractor represents that contractor **does ()** or **does not (X)** have a current contract with the Mississippi Department of Education.

The MDE has the right to review and align solicited services with a contractor’s current awarded contract for services to ensure conflicts and/or limitations do not exist. If conflicts and/or limitations exist, the MDE at its discretion may reject the Offeror’s proposal and the Offeror will not be considered for an award for this solicited service.

Potential contractors are required to provide a listing of each executed contract or contract applied, please provide the following:

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	

Program Office Name	
Contract Service	
Contract Amount	\$
Contract Dates of Service	



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

Request for Proposal (RFX No. 3120003047)
Strategic Planning and Performance Scorecard
Amendment Number One

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by
2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

***Request for Proposal (RFX No. 3120003047)
Strategic Planning and Performance Scorecard
Amendment Number One***

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

- 3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

- 4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Signed by: 

1/29/2025

Authorized Signature

Date

Melissa Matarazzo

Printed Name

**Request for Proposal (RFX No. 3120003047)
Strategic Planning and Performance Scorecard
Amendment Number One**

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror’s proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Melissa Matarazzo

Title: Chief Administrative Officer

Signature:  _____ Date: 1/29/2025



UPDATED

Acknowledgment of Amendments

Request for Proposal

Strategic Planning and Performance Scorecard - REISSUE

RFX No. 3120003047

Amendment Number Two

January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables:** Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

Request for Proposal
Strategic Planning and Performance Scorecard-REISSUE
RFX No. 3120003047
Amendment Number Two

- **Documentation and Reporting** – Specify how progress will be documented and communicated
2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?
Answer: No.
 3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?
Answer: In-person workshops
 4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?
Answer: No.
 5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?
Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2
 6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?
Answer: There are no finalist presentations included in this solicitation.
 7. Are there budgetary constraints or expectations that should guide proposal preparation?
Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration
 8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?
Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.
 9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?
Answer: There is no flexibility.
 10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

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Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

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17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

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MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
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Request for Proposal
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27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

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timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

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Answer: See previous response in Question #7.

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States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

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Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Signed by: 

1/30/2025
Date

Authorized Signature
Melissa Matarazzo
Printed Name

Request for Proposal
Strategic Planning and Performance Scorecard-REISSUE
RF# No. 3180003047
Amendment Number Two



**PEOPLE
FIRST**

**SERVICE IS
EVERYTHING**

**STRATEGY=
EXECUTION**

**RESULTS
MATTER**

ACKNOWLEDGEMENT OF AMENDMENTS

Every offeror's acknowledgement of every amendment (in writing)

Applicable: YES NO



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](https://mdek12.org/procurement/rfp/) at <https://mdek12.org/procurement/rfp/> under MDE Bid **Announcements section**. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

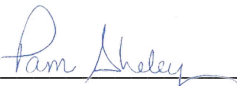
Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

02/04/25

Date

Pam Sheley

Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
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Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

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39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for [2024](#), effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

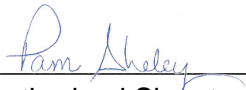
Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

02/04/25

Date

Pam Sheley
Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

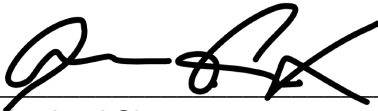
Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

February 5, 2025

Date

Amos Fodchuk

Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

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39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

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Answer: This represents a list of core stakeholders.

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Answer: State Board – 11 Members

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Answer: See previous response in Question #28.

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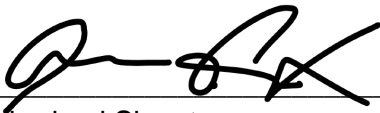
Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

February 5, 2025

Date

Amos Fodchuk

Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

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Monique Corley, Director
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The Mississippi Department of Education
Strategic Planning and Performance Scorecard
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359 North West Street
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1/10, 1/17/2025 #10925257

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1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

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A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](https://mdek12.org/procurement/rfp/) at <https://mdek12.org/procurement/rfp/> under MDE Bid **Announcements section**. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

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Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

Ken Wagner

Printed Name

1/30/2025

Date



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this Amendment Number Two, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- Key Milestones – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- Task Breakdown – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
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- Dependencies – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- Deliverables: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- Performance Indicators – Identity measurable success criteria for each milestone
- Monitoring Frequency – Specify how often progress will be reviewed
- Roles & Responsibilities – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- Feedback Mechanisms – Outline how ongoing feedback will be collected and incorporated
- Course Correction Plans – Detail how issues will be addressed if progress deviates from the roadmap

- Documentation and Reporting – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: **See Section 2.1(7) “Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats.”**

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MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

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Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- Align with the identified Strategic Goals,
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Answer: See previous response in Question #7.

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Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

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https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: **No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.**

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. **Can you please clarify how MDE's strategic plan for [2024](#)**, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. **Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?**

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

1/30/2025

Date

Ken Wagner

Printed Name

Tab 6 – Signed Contingent Fee/ Acknowledgement of Amendments

Revised October 10, 2024
Page 4 of 4

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdekt2.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

2/5/2025

Date

Kelsey Clark
Printed Name

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Answer: See previous response in Question #40.

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Authorized Signature

2/5/2025

Date

Kelsey Clark

Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

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4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

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Amendment Number One

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Mark A. Elgart
Authorized Signature

1/30/2025
Date

Mark A. Elgart
Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
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3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

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Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Mark A. Elgart
Authorized Signature

1/30/2025
Date

Mark A. Elgart
Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: *This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Carl Christopher

05/02/25

Authorized Signature

Date

Carl Christopher

Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030: https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

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Answer: See previous response in Question #40.

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Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

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Carl Christopher

05/02/25

Authorized Signature

Date

Carl Christopher

Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

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Clarion Ledger

Bids & Proposals

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All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](https://mdek12.org/procurement/rfp/) at <https://mdek12.org/procurement/rfp/> under MDE Bid **Announcements section**. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

Matt Bachman

Printed Name

February 3, 2025

Date



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
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The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
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2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

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Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

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Answer: There is no flexibility.

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Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

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MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

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39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

Matt Bachman

Printed Name

February 3, 2025

Date

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](#) under “Public Notice” Request for Applications, Qualifications, and Proposals section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: *If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.*



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of *the State Board of Education Contract Policies* and if required, *the Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

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4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Adam Hall

2025-01-16

Authorized Signature

Date

Adam Hall, Chief Financial Officer
Printed Name

Audit trail

Details

FILE NAME acknowledgement_of_amendment No. 1 RFX 3120003047.pdf - 1/16/25, 10:28 AM

STATUS ● Signed

STATUS TIMESTAMP
2025/01/16
15:33:59 UTC

Activity



SENT

carly.oconnell@k12coalition.com **sent** a signature request to:
• Adam Hall (adam.hall@k12coalition.com)

2025/01/16
15:30:51 UTC



SIGNED

Signed by Adam Hall (adam.hall@k12coalition.com)

2025/01/16
15:33:59 UTC



COMPLETED

This document has been signed by all signers and is **complete**

2025/01/16
15:33:59 UTC

The email address indicated above for each signer may be associated with a Google account, and may either be the primary email address or secondary email address associated with that account.



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
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40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Adam Hall

Authorized Signature

Adam Hall

Printed Name

2025-01-29

Date



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

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23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

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Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.**

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4 – Price/Budget.**

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

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Answer: See previous response in Question #44

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Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

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Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Authorized Signature

Date

Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](https://mdek12.org/procurement/rfp/) at <https://mdek12.org/procurement/rfp/> under MDE Bid [Announcements section](#). It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: *If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.*

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: *If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.*

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Erica J. Littleton
Authorized Signature

Jan. 29, 2025
Date

Erica J. Littleton
Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
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- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

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Answer: Confirmed.

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- **Align with the identified Strategic Goals,**
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timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

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Answer: See previous response in Question #7.

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Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

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Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

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Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

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Answer: See previous response in Question #28.

a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

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Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Erica J. Littleton
Authorized Signature

Jan. 29, 2025
Date

Erica J. Littleton
Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Authorized Signature



01/17/2025

Date

Patrick J. Dyer, Vice President

Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identify measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6**: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

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Authorized Signature

01/29/2025

Date

Patrick J. Dyer, Vice President

Printed Name

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid **Announcements section**. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

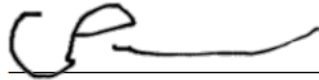
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- 4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

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Authorized Signature

2/4/25

Date

Cerena Parker

Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

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Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE [website at https://mdek12.org/procurement/rfp/](#) under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](https://mdek12.org/procurement/rfp/) at <https://mdek12.org/procurement/rfp/> under MDE Bid **Announcements section**. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.



Authorized Signature

Date

Printed Name



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables**: Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

18. In the portal located at [MDE Bid Announcements – Procurement](#) it states that Electronic Submissions can be emailed to RFXS RFXS@mdek12.org or MAGIC <https://portal.magic.ms.gov/irj/portal>. In the RFP it does not say anything about email being an approved way to submit. Is it approved for offerors to submit the completed proposals by email to RFXS@mdek12.org as it states in the portal?

Answer: Electronic Submissions submitted to RFXS RFXS@mdek12.org are intended for Request for Application. Specifically, see below for reference:

MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
MAGIC <https://portal.magic.ms.gov/irj/portal>

This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

19. Would this Scorecard Dashboard be internal to DoE staff and MS district/school staff, or is a public facing dashboard needed as well?

Answer: A high-level summary of key strategic goals and progress indicators should be included as part of the performance dashboard that can be used publicly to increase transparency and stakeholder engagement.

20. Would the public facing dashboard be considered: not necessary, an optional additional feature, or a requirement.

Answer: It would be considered a necessary requirement.

21. In what data systems does the Mississippi Department of Education store the data that would be used to inform the Scorecard Dashboard?

Answer: The data would primarily be housed in MS School Information System (MSIS). However, depending on the identified strategic goals and supporting activities, auxiliary systems may be needed to provide a complete, comprehensive snapshot of progress.

22. Would all data be integrated from the [Mississippi Student Information System \(MSIS\)](#)?

Answer: See previous response in Question #21.

23. Would SIS integration be done at the individual district level?

Answer: Data is collected at the district level.

24. Would data need to be integrated from any additional data systems such as Learning Management Systems, Behavior Systems, Assessment Systems?

Answer: See previous response in Question #21.

25. MS's current strategic plan #2 states, "EVERY Student Graduates from High School and is Ready for College and Career". Is the state interested in adopting a tool that supports graduation tracking and transcript auditing, ensuring all students are supported in achieving an on-time graduation

Answer: This option is not currently included in the advertised Scope of Services; and would be premature until new strategic goals have been identified as solicited for under this engagement.

26. Can you please confirm if it is acceptable to place the following forms in **Tab 6**: Appendix E: Acknowledgement of Amendment, Appendix F: Assurances and Certs, Appendix G: Public Record, Appendix H: Contract.

Answer: Confirmed.

27. Please confirm it is acceptable to place Appendix I - Cost Data/Budget in **Tab 4** – Price/Budget.

Answer: Confirmed.

28. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: This document posted at the link above is prepared as a budgetary requirement as required by [MS Code Section 27-103-155\(1\)](#). It outlines the agency's overarching goals; however, the outcomes and activities presented herein do not comprehensively reflect the MDE's full implementation of activities and objectives as detailed in its strategic plan. While the two documents share similarities and may overlap in certain areas, the MDE Strategic Plan serves as the definitive guide for achieving the goals outlined within. The new strategic plan would replace the existing strategic plan.

29. Our understanding of the request is that the first 6 months of the work will focus on the development of the strategic plan and the performance scorecard and the final 6 months will focus on ensuring proper implementation, setting up structures for monitoring, and creating plans for reviewing and adjusting. Is this an accurate understanding?

Answer: This is an accurate understanding. There are no specific criteria other than the scorecard should:

- **Align with the identified Strategic Goals,**
- **Be measurable metrics,**
- **Include stakeholder input,**
- **Should utilize performance data.**

30. My colleagues and I at [REDACTED] are considering responding to RFX 3120003047 to develop a strategic planning and performance scorecard for the Mississippi State Board of Education. The RFP presents a one-year timeline for the work. Does MDE require respondents to propose a one-year

timeline, or can respondents propose a shorter engagement if they can complete the full scope of work in less time?

Answer: This solicitation contemplates a 12-month engagement.

31. Does the MDE State Board of Education have an anticipated budget for RFP 3120003047?

Answer: See previous response in Question #7.

32. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

33. Will a performance bond be required as that is more typical for construction projects and not service delivery?

Answer: Performance is required for service delivery.

34. There are clauses for unilateral indemnification and termination for convenience with no limitation of liability. Would MDE consider bilateral indemnification and termination language or a liability cap to the face value of the awarded contract?

Answer: The termination for convenience clause is required by Office of Personal Service Contract Review Rules and Regulations.

States are prohibited from indemnifying or holding harmless any party. (Miss. Const. Art. 4, § 100; Miss. AG Op., Clark (June 7, 2002); Miss. AG Op., Chamberlin (Oct. 18, 2002)). Therefore, we cannot have a bilateral indemnification clause.

35. We see this document online that appears to be for the years 2026-2030:

https://www.mdek12.org/sites/default/files/Offices/MDE/SSE/strategic_plan_and_goals_june_2024_lbo.pdf. How does this relate to the request within the RFP?

Answer: See previous response in Question #28.

36. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: It is expected that the proposal will provide a description of how the selected vendor will engage with each stakeholder to document feedback for consideration in the development of the Strategic Plan.

37. Can you provide greater detail on the expectations for external stakeholder involvement? How much district-level engagement do you anticipate?

Answer: This should be identified during the development of the Project Work and Stakeholder Engagement Plans.

38. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

39. Does MDE have a preference in regard to performing the requested services on-site, remotely, or via a hybrid model (i.e., a mix of on-site and remote work)?

Answer: MDE will consider a hybrid model.

40. Can MDE please share if a consulting firm was hired to assist in the development of MDE's previous Strategic Plan. And if so, can MDE please share the name of the consulting firm.

Answer: The previous Strategic Plan was developed by MDE staff and other stakeholders.

41. Can MDE please now confirm that this an exhaustive list of the internal and external groups that MDE expects the awarded vendor to engage with: board members, leadership, educators, policymakers, students, community leaders, staff, and community members If there are others, can MDE please now list them.

Answer: This represents a list of core stakeholders.

42. Can MDE please now provide estimates for how many individuals are in each of the internal and external groups listed above (i.e., board members, leadership, educators, policymakers, students, community leaders, staff, and community members).

Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for [2024](#), effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*



Authorized Signature

Date

Printed Name

Tab Six: Appendix E, Amendments

Amendment Number One

NOTE: *This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Anna d'Entremont

2/3/25

Authorized Signature

Date

Anna d'Entremont, Manager

Printed Name

Amendment Number Two

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Anna d'Entremont

2/3/25

Authorized Signature

Date

Anna d'Entremont, Manager

Printed Name

Request for Proposal
Strategic Planning and Performance Scorecard-REISSUE
RFX No. 3120003047
Amendment Number Two

3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE [website](https://mdek12.org/procurement/rfp/) at <https://mdek12.org/procurement/rfp/> under MDE Bid **Announcements section**. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

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Authorized Signature

January 22, 2025

Date

Eve Van Devender, Sr. Contracting Officer

Printed Name

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

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Authorized Signature

January 29, 2025

Date

Eve Van Devender, Sr. Contracting Officer

Printed Name



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. ~~3120003030~~ 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by 2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

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Amendment Number One

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boxSIGN 4Q8RP7LZ-4P8ZP3RP

Authorized Signature

Irene Wan
Printed Name

Jan 29, 2025

Date



UPDATED

Acknowledgment of Amendments
Request for Proposal
Strategic Planning and Performance Scorecard - REISSUE
RFX No. 3120003047
Amendment Number Two
January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
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2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

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9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

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Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

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MDE Bid Announcements

REQUEST FOR PROPOSALS/QUALIFICATIONS/APPLICATIONS

Request for Application (Fillable Form)

Electronic Submissions: RFXS RFXS@mdek12.org or
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This solicitation is a Request for Proposal. RFP (RFX No. 3120003047) states that submissions should be submitted in accordance with Section 6.4.

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Answer: State Board – 11 Members

MDE Leadership – up to 15 persons

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Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

- a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*


box SIGN 4Q8RP7LZ-4P8ZP3RP

Authorized Signature

Irene Wan

Printed Name

Jan 29, 2025

Date



Acknowledgment of Amendment
Request for Proposal
RFX #3120003047
Strategic Planning and Performance Scorecard
Amendment Number One
January 15, 2025

The Office of the State Superintendent, through this **Amendment Number One**, modifies Request for Proposal (RFP) issued, January 10, 2025. The following below has been modified:

1. Legal Notice advertised January 10, 2025, is amended as follows:

Clarion Ledger

Bids & Proposals

Originally published at clarionledger.com on 01/10/2025

The Mississippi Department of Education (MDE) is soliciting for services and/or products for the purpose of Strategic Planning and Performance Scorecard. For inquiries, please contact Leigh Washington at 601-359-5716.

The solicitation may be accessed by potential offerors at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section. Written questions should be submitted to ProcurementQnR@mdek12.org by the deadline of January 24, 2025, at 2:00 p.m.

Copies of all questions submitted, and the responses will be posted to the MDE's website at <https://mdek12.org/procurement/rfp/> under the MDE Bid Announcements section and will be available to the general public by January 28, 2025.

All responses to the solicitation must be submitted via MAGIC or shipped/mailed to the

Request for Proposal (RFX No. 3120003047)
Strategic Planning and Performance Scorecard
Amendment Number One

following address:

Shipped to:
(FedEx, UPS, etc.)

Monique Corley, Director
Office of Procurement
The Mississippi Department of Education
Strategic Planning and Performance Scorecard
RFX No. 3120003030-- 3120003047
359 North West Street
Jackson, MS 39201
(DO NOT OPEN)

The deadline for receipt of responses is on or before Wednesday, February 5, 2025, by
2:00 p.m., Central Standard Time (CST).
1/10, 1/17/2025 #10925257

***Request for Proposal (RFX No. 3120003047)
Strategic Planning and Performance Scorecard
Amendment Number One***

2. Subsection 1.1 is amended as follows:

1.1 Purpose and Goals

The Mississippi Department of Education (MDE) Office of the State Superintendent issues this Request for Proposal to solicit offers from qualified, experienced, and responsible sound Offerors to develop a comprehensive strategic plan and performance scorecard for the MS State Board of Education. Proposing vendors must have the proven ability to perform all core services requested in this solicitation. A more detailed listing of services is contained in the **Scope of Services (2.1)**.

The objective of this solicitation is to establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability.

The State Board of Education approved the last major update to its strategic plan in November 2018. Since that time, the plan has been refined with updated strategies in November 2019, and revised outcomes in September 2021. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

All contract awards are at the discretion of the State Board of Education (SBE). The contract will be awarded for a one-year term. Each year of the contract will be reviewed to ensure services will be continued annually and shall be contingent upon successful completion of the services in the preceding year's contract, availability of funding and a performance-based evaluation. This solicitation and any resulting contract(s) shall be governed by the applicable provisions of the *State Board of Education Contract Policies* and if required, the *Mississippi Public Procurement Review Board (PPRB), Office of Personal Service Contract Review (OPSCR) Rules and Regulations*, a copy of which is available at 501 N. West Street, Jackson, Mississippi 39201 for inspection or visit [PPRB/OPSCR Rules and Regulations](#). The contract Standard Terms and Conditions (STC) has been included as Appendix B for your review and acceptance. If the Vendor objects to any of the Standard Terms and Conditions, the objection may be considered as an adequate cause for rejection without further negotiations.

A copy of this solicitation, including all appendices and any subsequent amendments, including the Question and Answer amendment, if issued, will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the website for updates regarding this procurement.

- 3. Appendix E – Acknowledgement of Amendment is amended as follows:

Appendix E – ACKNOWLEDGEMENT OF AMENDMENT

The Question-and-Answer and any other amendment shall be signed, if issued. The Question-and-Answer amendment will be posted on the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. It is the sole responsibility of all interested vendors to monitor the MDE website for updates regarding any amendment to the solicitations.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

- 4. Appendix F, Assurances and Certification is amended, attached, and incorporated fully along with this Amendment Number One as part of RFP RFX #3120003047.

Note: If questions are not received by the MDE an amendment will not be posted and the Acknowledgement of Amendment process shall be waived.

Amendment Number One

NOTE: This amendment one is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.

Signed by: 

1/29/2025

Authorized Signature

Date

Melissa Matarazzo

Printed Name

**Request for Proposal (RFX No. 3120003047)
Strategic Planning and Performance Scorecard
Amendment Number One**

Appendix F – ASSURANCES AND CERTIFICATION

REPRESENTATION REGARDING CONTINGENT FEES: Offeror represents that it has not retained a person to solicit or secure a state contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in Offeror’s proposal.

REPRESENTATION REGARDING GRATUITIES: Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of the MDE a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of the MDE has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by contractor. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: The Offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid.

PROSPECTIVE CONTRACTOR’S REPRESENTATION REGARDING CONTINGENT FEES: The prospective Contractor represents as a part of such Offeror’s proposal that such Offeror has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract.

NON-DEBARMENT: This certification is a material representation of fact relied upon by the Contracting Agencies. If it is later determined that the Offeror did not comply with 2 C.F.R. part 180, subpart C, and 2 C.F.R. part 3000, subpart C, in addition to remedies available to DFA and other Contracting Agencies, the federal government may pursue available remedies, including but not limited to suspension and/or debarment.

COMPLIANCE WITH EQUAL OPPORTUNITY IN EMPLOYMENT POLICY: Offeror understands that the MDE is an equal opportunity employer and therefore, maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, genetic information, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and Contractor agrees during the term of the agreement that Contractor will strictly adhere to this policy in its employment practices and provision of services.

I make the following certifications and assurances as a required element of this submission to which it is attached. The understanding that the truthfulness of the facts affirmed here and the continued compliance with these requirements are conditions precedent to the award or continuation of the related contract(s).

Name: Melissa Matarazzo

Title: Chief Administrative Officer

Signature:  _____ Date: 1/29/2025



UPDATED

Acknowledgment of Amendments

Request for Proposal

Strategic Planning and Performance Scorecard - REISSUE

RFX No. 3120003047

Amendment Number Two

January 28, 2025

The Office of the State Superintendent, through this **Amendment Number Two**, modifies Request for Proposal issued, January 10, 2025.

1. Can you provide further clarification on the level of detail required in the implementation roadmap and monitoring protocols?

Answer:

The Implementation Roadmap should include the following:

- **Key Milestones** – Major phases defined and outcomes (i.e. focus groups, strategic plan draft, stakeholder approval, rollout)
- **Task Breakdown** – List specific tasks and responsible parties under each milestone, such as scheduling focus groups, collecting stakeholder feedback, drafting documents, etc.)
- **Resources and Support** – Detail the resources (i.e. personnel, tools – virtual tools venue arrangements, etc) required to achieve each milestone
- **Dependencies** – Highlight any interdependencies between tasks or phases; for example, stakeholder feedback may be required before drafting the plan
- **Deliverables:** Clearly state the expected outputs for each phase

The Monitoring Plan should include the following:

- **Performance Indicators** – Identity measurable success criteria for each milestone
- **Monitoring Frequency** – Specify how often progress will be reviewed
- **Roles & Responsibilities** – Assign monitoring responsibilities (i.e. state superintendent, executive leadership)
- **Feedback Mechanisms** – Outline how ongoing feedback will be collected and incorporated
- **Course Correction Plans** – Detail how issues will be addressed if progress deviates from the roadmap

Request for Proposal
Strategic Planning and Performance Scorecard-REISSUE
RFX No. 3120003047
Amendment Number Two

- **Documentation and Reporting** – Specify how progress will be documented and communicated

2. Are there any specific templates or formats required for the strategic plan and performance scorecard deliverables?

Answer: No.

3. Does the MDE prefer in-person workshops over virtual sessions for stakeholder engagement?

Answer: In-person workshops

4. Are there specific tools or software systems (e.g., GIS, data visualization platforms) mandated for data collection and KPI reporting?

Answer: No.

5. Can you elaborate on the scoring methodology for the "Plan of Action" component (40%)?

Answer: The Plan of Action will be evaluated based on completeness and thoroughness in responding to Section 2

6. Will vendors have the opportunity to present their proposals if selected as a finalist, and how will this impact final scores?

Answer: There are no finalist presentations included in this solicitation.

7. Are there budgetary constraints or expectations that should guide proposal preparation?

Answer: There are no budgetary constraints or expectations that should guide proposal preparation. MDE recommends proposers submit their most competitive proposal for consideration

8. Does the performance bond requirement extend to subcontractors, or is it limited to the primary vendor?

Answer: No. Per Section 5, Minimum Requirements: Awarded vendor must agree to secure a performance bond for 100% of the awarded annual contract amount. The original performance bond is due within ten (10) days of execution of the contract and prior to commencement of services. For multi-year awards, a performance bond is due to the program office contact each year prior to the commencement of services. The performance bond shall not be waived or negotiated.

9. Can you confirm if there is flexibility in the deliverable deadlines outlined in Section 2.3?

Answer: There is no flexibility.

10. If unforeseen delays occur, how will contract extensions or renegotiations be handled?

Answer: Refer to Section 39, Modification or Renegotiation in the Standard Terms and Conditions (Appendix B)

11. Are vendors expected to provide printed copies of the final deliverables in addition to electronic formats?

Answer: See Section 2.1(7) "Documentation Handover: Provide all final documents, including the strategic plan, performance scorecard, implementation roadmap, and monitoring plan, in both electronic and print formats."

12. Will MDE provide access to historical performance data or any specific data sets required for the environmental scan and SWOT analysis?

Answer: Yes, from existing data sets.

13. Is registration with PayMode mandatory before submitting the proposal, or can it be completed post-award notification?

Answer: PayMode is not required before submitting a proposal. Registration can be completed post-award notification.

14. Will subcontractors also need to register with MAGIC and PayMode?

Answer: No.

15. Are there specific stakeholder groups, beyond those listed in the RFP, that must be prioritized during the engagement process?

Answer: No.

16. Does the MDE have any preferred methods for obtaining stakeholder feedback (e.g., focus groups, surveys)?

Answer: No.

17. Could you please confirm that Appendix D - REFERENCE SCORE SHEET will be used for internal use by MDE staff and does not need to be submitted with the proposal by the offerors?

Answer: Confirmed. Reference Score Sheet (Appendix D) need not be submitted with the proposal by the offerors.

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The remaining number of persons required may be determined during the development of the Project Work Plan.

43. Can MDE please provide an estimate of the number of and a description of the individuals included in the leadership group with whom the awarded vendor would facilitate a missions and vision review?

Answer: See previous response in Question #42

44. Can MDE please provide an estimate of the number of and a description of the individuals included in the community leadership group with whom the awarded vendor would facilitate stakeholder

workshops. If MDE cannot provide the above information, can MDE please describe how MDE will support the awarded vendor in identifying the community leadership group.

Answer: These stakeholders should be identified in cooperation with the Chairman of the State Board of the Education, State Superintendent and the Executive Leadership team during the development of the Project Work Plan.

45. In section 2.1 (Scope of Services), the RFP reads: "The response should include a timeline of the work and deliverables to be completed in each year." Is MDE looking for respondents to propose work beyond the one-year engagement outlined in the RFP?

Answer: No, the word "each" was included in error. This is contemplated to be a one-year engagement with all deliverables due on before the contracts expiration.

46. In 2.1.4 (Stakeholder Engagement and Workshops), is MDE looking for the vendor to facilitate multiple workshops with a Strategic Planning Committee of board members, educators, and community leaders; or, is MDE looking for the vendor to facilitate separate workshops with each of these groups?

Answer: See previous response in Question #44

47. Will the strategic plan and/or performance scorecard require alignment with specific educational technology platforms or systems?

Answer: This should be determined during the development of the Project Work Plan.

48. Can you please clarify how MDE's strategic plan for 2024, effective for 2026-2030, interacts with the request for the development of a strategic plan in the RFP?

Answer: See previous response in Question #28.

a) Can MDE share context for how the strategic plan for 2024 informs this RFP and if they anticipate changes to specific areas identified in the strategic plan?

Answer: See previous response in Question #28.

49. Will this project support MSDE's reporting requirements? If so, can MSDE outline the reporting requirements for which they are responsible?

Answer: Yes. Reporting requirements will be provided to awarded vendor.

50. Is there an incumbent vendor who supported previous Strategic Plan Development? If so, who was the vendor?

Answer: See previous response in Question #40.

51. If electing to submit our proposal electronically through the Mississippi Accountability Governmental Information Collaboration System (MAGIC), please confirm that a hardcopy submission is not also required.

Answer: Confirmed.

52. If a bidder is awarded the contract to perform the work outlined in this RFP, would the bidder be barred from competing for a summative assessment RFP issued by the State?

Answer: No.

Amendment Number Two

NOTE: *This amendment two is hereby made a part of the Mississippi Department of Education's Request for Proposals/Applications/Qualifications/Invitation for Bid. The Vendor acknowledges receipt of said amendment and is made aware of the changes contained therein. By signing this form, the Offeror accepts the changes as part of the contract requirement.*

Signed by: 

1/30/2025
Date

Authorized Signature
Melissa Matarazzo
Printed Name

Request for Proposal
Strategic Planning and Performance Scorecard-REISSUE
RF# No. 3180003047
Amendment Number Two

CONFLICT OF INTEREST CERTIFICATIONS

The list of offerors, their principals, their parent organizations, and their subsidiary organizations which was provided to those executing conflict of interest certifications; all executed certifications with the Mississippi Ethics in Government laws attached

Applicable: YES NO

EVALUATION OF PROPOSALS OR QUALIFICATIONS

Any documentation created by the procurement officials, the evaluation committee, or the advisors to the evaluation committee regarding the responsive and responsible determination and points allocated to the offerors; documentation of any discussions with offerors; post evaluation affidavits (if applicable)

Applicable: YES NO



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Name of Solicitation: _____

Evaluator Initial/Number: Summary Assigned Proposal Number: 8 Anka

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p>	<p>Points Awarded</p>
<p>40 Points Maximum – Plan of Action</p>		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p>	<p>Points Awarded</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p>	<p>Points Awarded</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded 313.04</p>



Name of Solicitation: An Lar

Evaluator Initial/Number: 1 Assigned Proposal Number: 8

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>* Leadership seems to be capable to offer the services * Limited expense of educator work.</p>	<p>Points Awarded</p> <p>12</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p>* Several examples of previous work but in the Education area</p>	<p>Points Awarded</p> <p>5</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>* I do not see a clear plan for quality stateholder support. no Strategic Plan. * No visual examples of Deliverables based on previous body of work.</p>	<p>Points Awarded</p> <p>12</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>20.34</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>49.34</p>



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Name of Solicitation: AnLar

Evaluator Initial/Number: #3 DB Assigned Proposal Number: #8

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>56 employees 4 assigned</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>10</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>No SDE Strategic plans no example of LEA plan</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>0</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>Timeline included but no clear on action plans</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>10</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center;"><i>20.34</i></p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p style="text-align: center;"><i>40.34</i></p>



Name of Solicitation: Anlar

Evaluator Initial/Number: 5W Assigned Proposal Number: 8

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>12 yrs - 50 employees Resumes qualified mult staff</i></p>	<p>Points Awarded</p> <p style="text-align: center;">20</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>SEA TX TN</i></p>	<p>Points Awarded</p> <p style="text-align: center;">7</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>Approach to Strategic Planning (detailed) Detailed Work Plan - SWOT no examples/work product</i></p>	<p>Points Awarded</p> <p style="text-align: center;">15</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>	<p style="text-align: right; font-size: 2em;">13570480</p>	<p>Points Awarded</p> <p style="text-align: center;">20.34</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p style="text-align: center;">62.34</p>



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Name of Solicitation: AdLar

Evaluator Initial/Number: 4/Hs Assigned Proposal Number: 8

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p><i>Key personnel identified</i></p> <p><i>References align</i></p>	<p>Points Awarded</p> <p>17</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p><i>Partnered w/ over 20 states ; worked w/ numerous state agencies</i></p>	<p>Points Awarded</p> <p>7</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p><i>- detailed timeline</i></p> <p><i>- performance scorecard detailed</i></p>	<p>Points Awarded</p> <p>19</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>20.34</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p>63.34</p>



Name of Solicitation: Anlar

Evaluator Initial/Number: 2 JK Assigned Proposal Number: 8

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>12 yrs. company experience Experience of SECC TX strategic plan of EC</p>	<p>Points Awarded</p> <p>4</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p>TX, RI planning, esp. spearheaded</p>	<p>Points Awarded</p> <p>5</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>Not many details on K12 = Genanz plan - scorecard platform not mentioned</p>	<p>Points Awarded</p> <p>15</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		
<p>CUMULATIVE TOTAL POINTS AWARDED</p>	<p>Total Points Awarded <u>44.34</u></p>	

Name of Solicitation: _____ Anlar _____

Evaluator Initial/Number: _____ 6 _____ Assigned Proposal Number: _____ 8 _____

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Solid but boilerplate, no details around KPI dashboards, missing details that should reflect knowledge of Mississippi</p>	<p>Points Awarded 15</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: OK</p>	<p>Points Awarded 6</p>
<p>b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: Solid but boilerplate, no details around KPI dashboards; missing details that should reflect knowledge of Mississippi</p>	<p>Points Awarded 12</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded 20.34</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded 53.34</p>



Name of Solicitation: _____

Evaluator Initial/Number: Summary Assigned Proposal Number: 3 Cogniq

MANAGEMENT FACTORS		
25 Points Maximum – Management Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)	Comments:	Points Awarded
40 Points Maximum – Plan of Action		
a. Record of past performance of similar work (10 Points)	Comments:	Points Awarded
b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)	Comments:	Points Awarded
PRICE FACTOR		
35 Points Maximum – Price Budget – Formula The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.		Points Awarded
CUMULATIVE TOTAL POINTS AWARDED		Total Points Awarded

357.24
357.24

307.54
①



Name of Solicitation: Cognia

Evaluator Initial/Number: JK 1 Assigned Proposal Number: JK 3

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>* Cognia seems to have the ability to perform the work based on the RFP proposal, but no concrete examples of previous work.</p>	<p>Points Awarded <u>12</u></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p>* I see no examples of past work w/ SEAS, but other work exists.</p>	<p>Points Awarded 5 <u>5</u></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>* I do not see a defined plan for follow-up @ the conclusion of the project.</p> <p>* I do see reference to a report card but no clear example.</p>	<p>Points Awarded <u>10</u></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded <u>23.39</u></p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded 50.39 <u>50.39</u></p>

JK
50.39 JK



Name of Solicitation: Cognia

Evaluator Initial/Number: 28 Assigned Proposal Number: 3

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: - Established company in K-12 + other ed. evaluation + support - SEA experience, though strategic planning not listed - LEA strategic planning - Personnel have strong K-12 background</p>	<p>Points Awarded</p> <p>20 15</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: - Strategic planning at LEA level only</p>	<p>Points Awarded</p> <p>5 10</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: - Broad overview of plan; need more specifics on surveys, focus groups, etc. - Items seem off-the-shelf / generic; not specific to K-12 - Scorecard examples appear basic, like an Excel chart</p>	<p>Points Awarded</p> <p>15</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>23.39</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>63.29</p>



Name of Solicitation: Cognia

Evaluator Initial/Number: #3 DB Assigned Proposal Number: #3

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>Not sure of who is being assigned to this project</i> <i>5 assigned</i></p>	<p>Points Awarded</p> <p><i>11</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>noted a few LEAs and but no SDE Strategic plans</i></p>	<p>Points Awarded</p> <p><i>4</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>Lack of specific timelines</i></p>	<p>Points Awarded</p> <p><i>10</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p><i>23.39</i></p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p>48.39 <i>48.39</i></p>



Name of Solicitation: Cognia

Evaluator Initial/Number: 4/Hs Assigned Proposal Number: 3

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: - Selected a team specifically to work w/ MS; team has knowledge & understanding of state</p>	<p>Points Awarded</p> <p>17</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: Worked w/ SOE & SD</p>	<p>Points Awarded</p> <p>6</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: - phases for planning process are detailed - included visuals of performance scorecards -</p>	<p>Points Awarded</p> <p>20</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>23.39</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>66.39</p>

Name of Solicitation: Cognia

Evaluator Initial/Number: 5^N Assigned Proposal Number: 3

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p><i>Org Structure - SEA Experience</i> <i>Key Personnel/Referrals</i> <i>References</i> <i>SOS 2009</i></p>	<p>Points Awarded</p> <p style="font-size: 24pt;">25</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p><i>COA / COA</i></p>	<p>Points Awarded</p> <p style="font-size: 24pt;">10</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p><i>POA - detailed, easy to follow</i> <i>4 phase process for strategic planning</i> <i>detailed phase of planning</i></p> <p><i>Trust Municipal</i> <i>Planning Co.</i></p>	<p>Points Awarded</p> <p style="font-size: 24pt;">25</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>	<p style="font-size: 24pt; text-align: right;">118,000</p>	<p>Points Awarded</p> <p style="font-size: 24pt;">23.39</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p style="font-size: 24pt;">73.39</p>

83.39

Name of Solicitation: _____ Cognia _____

Evaluator Initial/Number: _____ 6 _____ Assigned Proposal Number: _____ 3 _____

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Seems boiler plate, but liked the KPI dashboard view (not very innovative technically, but the first to show an approach to this key aspect of the RFP.</p>	<p>Points Awarded 13</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p>	<p>Points Awarded 7</p>
<p>b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: Missing richness of the experience. Not clear in person v. virtual.</p>	<p>Points Awarded 12</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded 23.39</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded 55.39</p>



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Name of Solicitation: _____

Evaluator Initial/Number: Summary Assigned Proposal Number: 7 Catalyst

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	Comments:	Points Awarded
40 Points Maximum – Plan of Action		
a. Record of past performance of similar work (10 Points)	Comments:	Points Awarded
b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)	Comments:	Points Awarded
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		Points Awarded
CUMULATIVE TOTAL POINTS AWARDED		Total Points Awarded <u>123,42</u>



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Name of Solicitation: Katalyst

Evaluator Initial/Number: [Signature] Assigned Proposal Number: 7

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>* Leadership experience is in the healthcare field</i></p>	<p>Points Awarded <i>5</i></p>
<p>40 Points Maximum – Plan of Action</p>		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>* No education experience</i></p>	<p>Points Awarded <i>0</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>* It is clear based on the proposal that little to no effort was given to the proposal.</i></p>	<p>Points Awarded <i>5</i></p>
<p>PRICE FACTOR</p>		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded <i>9.57</i></p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded <i>19.57</i></p>



Name of Solicitation: Katalyst Consulting

Evaluator Initial/Number: 2 JC Assigned Proposal Number: 7

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <u>No Education or K12 mentioned</u></p>	<p>Points Awarded</p> <p style="text-align: center;"><u>2</u></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <u>No detail in this</u></p>	<p>Points Awarded</p> <p style="text-align: center;"><u>0</u></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <u>No</u></p>	<p>Points Awarded</p> <p style="text-align: center;"><u>0</u></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center;"><u>9.57</u></p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p style="text-align: center;"><u>11.57</u></p>



MISSISSIPPI
DEPARTMENT OF
EDUCATION

Ensuring a bright future for every child

Name of Solicitation: Katalyst

Evaluator Initial/Number: #3 DB Assigned Proposal Number: #7

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>2 resumes 2 TBD</i></p> <p><i>unsure of experience w/ education</i></p> <p><i>none notes</i></p>	<p>Points Awarded</p> <p><i>5</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>No references w/ school education entities</i></p>	<p>Points Awarded</p> <p><i>0</i></p>
<p>b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>No detailed timeline</i></p>	<p>Points Awarded</p> <p><i>11</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p><i>9.57</i></p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p><i>25.57</i></p>



MISSISSIPPI
DEPARTMENT OF
EDUCATION

Ensuring a bright future for every child

Name of Solicitation: Katalyst

Evaluator Initial/Number: 4/HS Assigned Proposal Number: 7

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>2 team members not listed or identified</p> <p>2 References of past work did not include any work w/ an SBE or school district</p>	<p>Points Awarded</p> <p>4</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p>References bid not see evidence of this</p>	<p>Points Awarded</p> <p>0</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>- Seven phase approach</p> <p>- Deliverables, milestones, & tasks not detailed.</p>	<p>Points Awarded</p> <p>4</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>9.57</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>17.57</p>



Name of Solicitation: Katalyst Consulting Partners

Evaluator Initial/Number: 5/PA Assigned Proposal Number: 7

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>15 yrs. limited details limited references</i></p>	<p>Points Awarded 10</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p>	<p>Points Awarded 0</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>Such plan approach - SMART Goals limited details to propose no examples</i></p>	<p>Points Awarded 10</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>	<p><i>288,448 327,808</i></p>	<p>Points Awarded 9.57</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded 29.57</p>

Name of Solicitation: _____ JSP Katalyst _____

Evaluator Initial/Number: _____ 6 _____ Assigned Proposal Number: _____ 7 _____

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Details?</p>	<p>Points Awarded 5</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: Details?</p>	<p>Points Awarded 0</p>
<p>b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: Details?</p>	<p>Points Awarded 5</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded 9.57</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded 19.57</p>

Name of Solicitation: _____

Evaluator Initial/Number: Summary Assigned Proposal Number: 4 Leamer's Edge

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p>	<p>Points Awarded</p>
<p>40 Points Maximum – Plan of Action</p>		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p>	<p>Points Awarded</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p>	<p>Points Awarded</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded 344.72</p>

Name of Solicitation: Learnus Edge

Evaluator Initial/Number: H1 Assigned Proposal Number: 4

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: * I like the Strategic Plan Goal Dashboard. * There seems to be lots of informal related details. The mgmt of the account is related to the quality quality of the leadership team</p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;">12</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: not see info * I see limited examples of work w/ SEA's</p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;">4</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: * I see Plan of origin system * I would like to see specific examples of report card.</p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;">16</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		
<p>CUMULATIVE TOTAL POINTS AWARDED</p>	<p>Total Points Awarded</p> <p style="text-align: center; font-size: 2em;">54.12</p>	



MISSISSIPPI
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Name of Solicitation: Learner's Edge (K12 Coalition)

Evaluator Initial/Number: 2 JL Assigned Proposal Number: 4

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Principals cite experience in K-12 ed, among other areas (at district level) + charter schools</p>	<p>Points Awarded</p> <p>16</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: SEA Strategic Planning not mentioned</p>	<p>Points Awarded</p> <p>1</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: - District (not state) data analysis mentions - Generic outline - Plan seems labor-intensive for districts + district, rather than state - Scorecard lacks data and appears to be more of a progress focused maintaining tool looks like Excel chart</p>	<p>Points Awarded</p> <p>15</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>22.12</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>54.12</p>



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Name of Solicitation: Learner's Edge

Evaluator Initial/Number: #3 DB Assigned Proposal Number: #4

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>480 employees - only 4 resumes</i></p>	<p>Points Awarded</p> <p><i>12</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>No SOE strategic plans only LEAs</i></p>	<p>Points Awarded</p> <p><i>4</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>Detailed timeline Scorecard example</i></p>	<p>Points Awarded</p> <p><i>20</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p><i>22.12</i></p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p><i>58.12</i></p>



Name of Solicitation: Learner's Edge

Evaluator Initial/Number: 4/Hs Assigned Proposal Number: 4

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>- Staff members have varied experiences - teachers, district leaders, coaches - large company</p>	<p>Points Awarded</p> <p>12</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: numerous worked w/ SD & an SDE</p>	<p>Points Awarded</p> <p>5</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>- phases & stages of work are detailed - performance dashboard visuals AAA</p>	<p>Points Awarded</p> <p>15</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>22.12</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>54.12</p>



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Ensuring a bright future for every child

Name of Solicitation: K12 Coalition - Learner's Edge

Evaluator Initial/Number: SN Assigned Proposal Number: 4

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>2002 - MS S03 2023 References - Certifications JPS -</p>	<p>Points Awarded</p> <p style="text-align: center;">20</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: SEAS -</p>	<p>Points Awarded</p> <p style="text-align: center;">7</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>3 Strategic Planning stages Dashboard detailed graphics</p>	<p>Points Awarded</p> <p style="text-align: center;">20</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>	<p style="text-align: right; font-size: 2em;">124750</p>	<p>Points Awarded</p> <p style="text-align: center;">22.12</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>47 22 6</p> <p>69.12</p>

Name of Solicitation: _____Learners Edge_____

Evaluator Initial/Number: _____6_____ Assigned Proposal Number: _____4_____

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Seems boiler plate, but solid KPI dashboard view (more innovative technically, showing different approaches to the KPIs.</p>	<p>Points Awarded 18</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: Less explicit, less focused</p>	<p>Points Awarded 3</p>
<p>b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: Missing richness of the experience. Not clear in person v. virtual.</p>	<p>Points Awarded 12</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded 22.12</p>
CUMULATIVE TOTAL POINTS AWARDED		
		<p>Total Points Awarded 55.12</p>



Name of Solicitation: _____

Evaluator Initial/Number: Summary Assigned Proposal Number: 5 Lumen Impact

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	Comments:	Points Awarded
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	Comments:	Points Awarded
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	Comments:	Points Awarded
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		Points Awarded
CUMULATIVE TOTAL POINTS AWARDED		Total Points Awarded <u>322.98</u>



Name of Solicitation: Lumen

Evaluator Initial/Number: #3 DB Assigned Proposal Number: #5

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>3 resumes</i> <i>No references for SDEs or school districts</i></p>	<p>Points Awarded <i>10</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>No evidence</i></p>	<p>Points Awarded <i>0</i></p>
<p>b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>Timeline included</i></p>	<p>Points Awarded <i>12</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded <i>30.33</i></p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded <i>52.33</i></p>



Name of Solicitation: Lumen

Evaluator Initial/Number: KJ Assigned Proposal Number: 5

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>* I see the process that will be used, but I do not not see any specific examples of deliverables.</p> <p>* Time - bid goes beyond the time I anticipate that will be needed for full implementation.</p>	<p>Points Awarded</p> <p>18</p>
<p>40 Points Maximum – Plan of Action</p>		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p>* only two examples. Needs of the program are SEA Strat Plan</p>	<p>Points Awarded</p> <p>0</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>* Leadership seems to be capable to respond to needs of SEA, but limited experience.</p>	<p>Points Awarded</p> <p>10</p>
<p>PRICE FACTOR</p>		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>30.33</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>58.33</p>



Name of Solicitation: Lumen

Evaluator Initial/Number: SN Assigned Proposal Number: 5

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>5 yrs - founded - strategic planning process. 13 yrs. Brot Resumes No SBAS</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 24pt;"><i>15</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>No SBAS/LEAs</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 24pt;"><i>5</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>PWU's - Approach Situational Analysis - few details No examples</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 24pt;"><i>15</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula <i>91,000</i></p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center; font-size: 24pt;"><i>30.33</i></p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p style="text-align: center; font-size: 24pt;"><i>65.33</i></p>



Name of Solicitation: Lumen Impact

Evaluator Initial/Number: ZJ Assigned Proposal Number: 5

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> - Company is 5 years old - Charter school work - Not much SEA level 	<p>Points Awarded</p> <p>5</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: No evidence to SEA strategic planning.</p>	<p>Points Awarded</p> <p>0</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> - Rather generic plan, not specific to K-12 (eg. focus groups/stakeholder members not defined) - Scorecard development + platforms not addressed 	<p>Points Awarded</p> <p>10</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>30.33</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p>45.33</p>



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Name of Solicitation: Lumen

Evaluator Initial/Number: 4/H5 Assigned Proposal Number: 5

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>staff members have varied experiences</i> XXXXXX</p>	<p>Points Awarded</p> <p style="text-align: center;"><i>6</i></p>
<p>40 Points Maximum – Plan of Action</p>		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>I don't see where they worked with SBE or SDCs</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>0</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>- references a scorecard but it is not detailed</i> <i>- outlined in 6 steps</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>5</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center;"><i>30.33</i></p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p style="text-align: center;"><i>41.33</i></p>

Name of Solicitation: _____ Lumen _____

Evaluator Initial/Number: ____6____ Assigned Proposal Number: ____5____

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Team and approach appear strong</p>	<p>Points Awarded 20</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: Didn't see list of similar projects</p>	<p>Points Awarded 0</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: Approach appears strong, however there is a lack of details around the KPI work and examples of similar work/approaches</p>	<p>Points Awarded 10</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded 30.33</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded 60.33</p>

Name of Solicitation: _____

Evaluator Initial/Number: Summary Assigned Proposal Number: 1 MGT

MANAGEMENT FACTORS		
25 Points Maximum – Management Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)	Comments:	Points Awarded 10
40 Points Maximum – Plan of Action		
a. Record of past performance of similar work (10 Points)	Comments:	Points Awarded 0
b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)	Comments:	Points Awarded 30
PRICE FACTOR		
35 Points Maximum – Price Budget – Formula The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.		Points Awarded
CUMULATIVE TOTAL POINTS AWARDED		Total Points Awarded 235.35 260.42

Cumulative Score



Name of Solicitation: MBT Impact Solutions, LLC

Evaluator Initial/Number: JK 1 Assigned Proposal Number: 1111

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>*MBT seems to have a background in the K-12 arena. *The time line seems to exceed the time limit for the Project. *</p>	<p>Points Awarded</p> <p>15</p>
<p>40 Points Maximum – Plan of Action</p>		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p>	<p>Points Awarded</p> <p>5</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>*I do not see when a specific Start Cord is in the Project. * There is several additional areas of focus the base value.</p>	<p>Points Awarded</p> <p>11</p>
<p>PRICE FACTOR</p>		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>8.07</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>39.07</p>

Name of Solicitation: MGT

Evaluator Initial/Number: ZR Assigned Proposal Number: 1

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>Worked - Dtd projects with 11 LEAs or SEAs; 5 include strategic planning each about 10+ years of professional - Personnel had experience in K-12 though not all experience was in K-12</p>	<p>Points Awarded</p> <p>18</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: Evidence provided about 5 strategic planning projects with an LEA or SEA - Some detail involved internal management rather than student achievement</p>	<p>Points Awarded</p> <p>7</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: - All deliverables were addressed; however, there was little detail about the performance scorecard and how it would work - Jargon-heavy - Little mention of existing data/info. about MS education</p>	<p>Points Awarded</p> <p>18</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>8.07</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>51.07</p>



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Name of Solicitation: MGT

Evaluator Initial/Number: #3 DB Assigned Proposal Number: #1

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>MGT has 900 on their nationwide team, but limited number of employees assigned to this project (3)</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>11</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>experience with numerous state departments of education unsure if any str. plans w/ SDEs</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>4</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>Outline of Phase I planning Phase II Implementation</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>15</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>8.07</i></p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>38.07</i></p>



Name of Solicitation: MGT

Evaluator Initial/Number: 4/HS Assigned Proposal Number: 1

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> - large team w/ K-12 experience - chose a team that ^{they felt} represents MS the best including ed. policy, public ed., mgmt. change - large company 	<p>Points Awarded</p> <p style="text-align: center;">18</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p>Have worked in many states & w/ many groups - non-profits, S.D., & SBE</p>	<p>Points Awarded</p> <p style="text-align: center;">7</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> - Visual plan of action included - Created a <u>performance scorecard</u> - detailed objectives & deliverables 	<p>Points Awarded</p> <p style="text-align: center;">19</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center;">3.07</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p style="text-align: center;">52.07</p>



Name of Solicitation: MGT

Evaluator Initial/Number: SP Assigned Proposal Number: 1

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: 50 yrs/900 staff New Mexico Texas SWOT collaboration worked w/ other SBEs provided descriptions Staff resumes; staffing plan</p>	<p>Points Awarded</p> <p>20</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p>	<p>Points Awarded</p> <p>7</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: detailed plan of work / descriptions stakeholder engagement / timelines Plans - Key Actions detailed ✓ implementation Sample Work Products</p>	<p>Points Awarded</p> <p>20</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>	<p>341,768</p>	<p>Points Awarded</p> <p>8.07</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>55.07</p>

Name of Solicitation: _____MGT_____

Evaluator Initial/Number: ____6____ Assigned Proposal Number: ____1____

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Seems heavily dependent on the RFP, with less value add or explanation than would be helpful to understanding.</p>	<p>Points Awarded 10</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: Heavy on local school districts</p>	<p>Points Awarded 3</p>
<p>b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: heavily dependent on the RFP, with less value add or explanation than would be helpful to understanding.</p>	<p>Points Awarded 10</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded 8.07</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded 31.07</p>

Name of Solicitation: _____

Evaluator Initial/Number: Summary Assigned Proposal Number: 2 PCG

MANAGEMENT FACTORS		
25 Points Maximum – Management Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)	Comments:	Points Awarded
40 Points Maximum – Plan of Action		
a. Record of past performance of similar work (10 Points)	Comments:	Points Awarded
b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)	Comments:	Points Awarded
PRICE FACTOR		
35 Points Maximum – Price Budget – Formula The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.		Points Awarded
CUMULATIVE TOTAL POINTS AWARDED		Total Points Awarded <u>315.58</u> <u>361.58</u>

352.50
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Name of Solicitation: Public Consulting Group (PCG)

Evaluator Initial/Number: HL 1 Assigned Proposal Number: 2nd

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>* Project seems to be on the timeline established in RFP.</p> <p>* Project has specific contracts listed for each type.</p>	<p>Points Awarded</p> <p>19</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: Limited amount of work w/ state plans in SEA's. Most of the state plans seem to be w/ LEA's.</p>	<p>Points Awarded</p> <p>6</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>* Other</p> <p>* Person provides follow up as well as continue support.</p> <p>*</p>	<p>Points Awarded</p> <p>20</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p>14.25</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p>59.25</p>



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Name of Solicitation: PCG - Publiz Consulting Group

Evaluator Initial/Number: 2 [Signature] Assigned Proposal Number: 2

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>staff listed have multiple</i> <i>- Experience w/ SEAs + LEAs - 9 strategic plans for education,</i> <i>- Data visualization experience mentioned</i> References: <i>Klabama Dept of Ed.</i></p>	<p>Points Awarded</p> <p style="text-align: center;">18</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>- a strategic plans for SEAs or LEAs</i></p>	<p>Points Awarded</p> <p style="text-align: center;">8</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>- Improving student achievement mentioned</i> <i>- Reviewed current strategic plan</i> <i>- Includes survey of stakeholders + communication tactics</i> <i>- Includes survey/analysis of publicly available data + background</i> <i>- Described tool for scorecard</i></p>	<p>Points Awarded</p> <p style="text-align: center;">25</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center;">14.25</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p style="text-align: center;">65.25</p>



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Name of Solicitation: POG

Evaluator Initial/Number: # 3 DB Assigned Proposal Number: # 2

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>2,000 employees but limited number of employees assigned to this project (5)</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>11</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>experience with numerous state departments of education but strategic plans w/ local districts</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>5</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>outline of Phase I Planning Phase II Implementation Scan / Data Collection III Strategy Dev. IV Scorecard Dev. V Stakeholder Engagement and Monitoring VI Finalizing</i></p>	<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>15</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>14.25</i></p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p style="text-align: center; font-size: 2em;"><i>45.25</i></p>



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Name of Solicitation: PCG

Evaluator Initial/Number: 4/HIS Assigned Proposal Number: 2

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> -experienced team for project - large consulting team 	<p>Points Awarded</p> <p style="font-size: 24pt;">21</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> - Strategic plan for a SD, center worked w/ a SBE 	<p>Points Awarded</p> <p style="font-size: 24pt;">6</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> - Visual of deliverables listed - phase one & phase two - I think staged launch & planning meetings need to be in person - Stakeholder Engagement Plan *** - Stages are detailed 	<p>Points Awarded</p> <p style="font-size: 24pt;">20</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="font-size: 24pt;">14.25</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p style="font-size: 24pt;">61.25</p>



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Name of Solicitation: Public Consulting Group (PCG)

Evaluator Initial/Number: 5W Assigned Proposal Number: 2

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: 38 yrs 2000 employees references resumes edu apprais</p>	<p>Points Awarded</p> <p style="text-align: center;">20</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: sector more LEA / Govt SEA AU</p>	<p>Points Awarded</p> <p style="text-align: center;">7</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: Plan of Action - approach methodology Phase 1 - stages 2 - SMT PRO in understanding MDK Phase 2 - no sample work</p>	<p>Points Awarded</p> <p style="text-align: center;">20</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p> <p style="text-align: right;">193,648</p>		<p>Points Awarded</p> <p style="text-align: center;">14.25</p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p style="text-align: center;">61.25</p>

47
14
61

Name of Solicitation: _____PCG_____

Evaluator Initial/Number: _____6_____ Assigned Proposal Number: _____2_____

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Show more familiarity with MDE/SBE strategic planning and history. Surprised they didn't acknowledge MS gains. Team seems capable</p>	<p>Points Awarded 18</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: More state / SEA work</p>	<p>Points Awarded 6</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: similar comment as above. No details on the HOW of the KPI deliverables</p> <p>Appreciated detail regarding</p>	<p>Points Awarded 22</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded 23.39</p>
CUMULATIVE TOTAL POINTS AWARDED		
		<p>Total Points Awarded 60.25</p>

← 14.25

Name of Solicitation: _____

Evaluator Initial/Number: Summary Assigned Proposal Number: 6 Studies

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	Comments:	Points Awarded
40 Points Maximum – Plan of Action		
a. Record of past performance of similar work (10 Points)	Comments:	Points Awarded
b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)	Comments:	Points Awarded
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		Points Awarded
CUMULATIVE TOTAL POINTS AWARDED		Total Points Awarded 427.64

437.64
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Name of Solicitation: Student Education

Evaluator Initial/Number: [Signature] / 1 Assigned Proposal Number: 6

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p>* Leadership & Design team seem to have the skills needed to perform the scope of work</p> <p>* I like how the presentation of the proposal example is short & to the point & presents work results. Report card is in line w/ expectation.</p>	<p>Points Awarded</p> <p>18</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p>* Previous experience in Mississippi Mississippi.</p>	<p>Points Awarded</p> <p>6</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p>* The timeline seems to be in line w/ the expectations of MDE.</p> <p>* I like the combo of in person & virtual coaching.</p> <p>* Each of the identified stakeholders appear to be in line with needs of MDE.</p>	<p>Points Awarded</p> <p>20</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		
<p>CUMULATIVE TOTAL POINTS AWARDED</p>	<p>Points Awarded</p> <p>31.44</p>	

Total Points Awarded ~~75.44~~ 75.44 LE

* Clear ~~synch~~ timeline w/ the ~~Master~~ milestones established.



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Name of Solicitation: Studer Education

Evaluator Initial/Number: 2 JC Assigned Proposal Number: 6

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> - 15 yrs. experience as a company - K-12 + MS experience - District-level leadership experience 	<p>Points Awarded</p> <p style="font-size: 24pt;">18</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p>100+ Strategic Plans - Evidence of impact of scorecard</p>	<p>Points Awarded</p> <p style="font-size: 24pt;">8</p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <ul style="list-style-type: none"> - Full day on site sessions included - Diverse, facilitated focus groups, including business leaders - Iterative process - Scorecard platform not mentioned / - \$ 	<p>Points Awarded</p> <p style="font-size: 24pt;">25</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="font-size: 24pt;">31.44</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p style="font-size: 24pt;">82.44</p>



MISSISSIPPI
DEPARTMENT OF
EDUCATION

Ensuring a bright future for every child

Name of Solicitation: Studer

Evaluator Initial/Number: #3 70 Assigned Proposal Number: #6

MANAGEMENT FACTORS		
25 Points Maximum – Management Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)	Comments: <i>5 assigned</i> <i>1 LEA reference</i>	Points Awarded <i>10</i>
40 Points Maximum – Plan of Action		
a. Record of past performance of similar work (10 Points)	Comments: <i>No SDE strategic plans 1 LEA noted</i>	Points Awarded <i>2</i>
b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)	Comments: <i>No specific timeline</i>	Points Awarded <i>10</i>
PRICE FACTOR		
35 Points Maximum – Price Budget – Formula The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.		Points Awarded <i>31.44</i>
CUMULATIVE TOTAL POINTS AWARDED		Total Points Awarded <i>53.44</i>

Name of Solicitation: Studer

Evaluator Initial/Number: 4/HS Assigned Proposal Number: 6

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments:</p> <p><i>team works closely w/ K12 & HHS facilitated many strategic plans</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>20</i></p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments:</p> <p><i>Worked in many states & work referenced</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>6</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments:</p> <p><i>phases are detailed *** on site & virtual one on one sessions performance score card ***</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>22</i></p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center;"><i>31.44</i></p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded</p> <p style="text-align: center;"><i>79.44</i></p>



Name of Solicitation: Student Education

Evaluator Initial/Number: 5N Assigned Proposal Number: 6

MANAGEMENT FACTORS

<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: <i>edu founded 2010 division of Student Group 1999 Ref. BR. - Oxford</i> <i>160-200 edu. org. adv alignment + outcomes</i> <i>50 employees</i> <i>ms offices - virtual in other states</i> <i>100+ strategic plans - ms examples -</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>25</i></p>
<p>40 Points Maximum – Plan of Action</p>		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: <i>WETA/CA</i></p>	<p>Points Awarded <i>10</i></p>
<p>b. The quality and completeness of the Offeror's solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: <i>Noni Principals Frameworks -</i> <i>Detailed outline of Scope of Services</i> <i>Coaching model info -</i> <i>Detailed Plan Dev / Phase</i> <i>Next/Potential Strategic Planning Timeline & Process</i></p>	<p>Points Awarded</p> <p style="text-align: center;"><i>25</i></p>
<p>PRICE FACTOR</p>		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded</p> <p style="text-align: center;"><i>31.44</i></p>
<p>CUMULATIVE TOTAL POINTS AWARDED</p>		<p>Total Points Awarded</p> <p style="text-align: center;"><i>81.44</i> ← <i>91.44</i></p>

← 91.44

Name of Solicitation: _____ Studer _____

Evaluator Initial/Number: ____6____ Assigned Proposal Number: ____6____

MANAGEMENT FACTORS		
<p>25 Points Maximum – Management</p> <p>Possess personnel, equipment, and facilities to provide timely services; the ability to technically implement all services listed in this solicitation with qualified and experienced staff; references align with the services required. (25 points)</p>	<p>Comments: Seem quite familiar with Mississippi, mostly district based</p>	<p>Points Awarded 12</p>
40 Points Maximum – Plan of Action		
<p>a. Record of past performance of similar work (10 Points)</p>	<p>Comments: Unclear, not articulated, experience unexplained</p>	<p>Points Awarded 0</p>
<p>b. The quality and completeness of the Offeror’s solutions and action plans for providing the core services identified in the solicitation, demonstrating responsiveness, understanding, effectiveness, efficiency, and value to the SBE in a proposed approach. (30 points)</p>	<p>Comments: KPI dashboards do not seem well aligned with SEA needs.</p>	<p>Points Awarded 12</p>
PRICE FACTOR		
<p>35 Points Maximum – Price</p> <p>Budget – Formula</p> <p>The highest score is assigned to the lowest cost proposed. All other Offerors score will be based upon a budget formula approved by the State.</p>		<p>Points Awarded 31.44</p>
CUMULATIVE TOTAL POINTS AWARDED		<p>Total Points Awarded 55.44</p>

BEST AND FINAL OFFERS

Any requests received and all related correspondence, the Agency response, proof of distribution of the Agency response directly to bidders, on website, and on procurement portal; memorandum regarding reasonable time between response to request and submission deadline (if applicable)

Applicable: YES NO

**SINGLE PROPOSAL
OR QUALIFICATION
RECEIVED**

Required written determination

Applicable: YES NO

NOTICE OF INTENT TO AWARD AND EVALUATION COMMITTEE REPORT

*Notice of Intent to Award and Evaluation Committee Report,
including all required documents; proof of distribution directly
to offerors, on website, and on procurement portal; information
regarding debriefings, reconsideration, and the Agency
Procurement File on the website*

Applicable: YES NO

**OFFICE OF SUPERINTENDENT
Mississippi Department of Education
NOTICE OF INTENT**

NEW AWARD SUMMARY

Name of Solicitation (RFx No. 3120003047): Strategic Plan and Performance Scoreboard

Dates Advertised: January 10, 2025
January 17, 2025

Submission Due Date: February 5, 2025

Offeror's Submitting Responses:

1. Advanced Learning Partnerships
2. Anlar LLC
3. Cognia
4. Berry Dunn McNeil Parker
5. Cognia
6. Education First Consulting
7. Engage Learning, LLC
8. ILO Group LLC
9. Katalyst/James Stephen Price
10. Learner's Edge
11. LMcIntosh Career Consulting
12. Lumen Impact
13. Martin's Career Coaching & Learning Little People
14. MGT Impact Solutions
15. Public Consulting Group
16. Research Triangle Institute
17. Studer Education
18. The Boston Consulting Group
19. WestEd

Offerors 1, 3, 5, 6, 8, 9, 10, 15, 17, 18, and 19 were deemed non-responsive and/or non-responsible and have been notified separately in writing stating the reason(s).

The remaining offerors' (2, 4, 7, 11, 12, 13, 14 and 16) proposals were evaluated and ranked in order of highest overall score:

1. Studer Education, LLC
2. Cognia
3. Public Consulting Group

4. Learner's Edge
5. Lumen Impact
6. Anlar, LLC
7. MGT Impact Solutions
8. Katalyst

Awarded Vendor: Studer Education, LLC
City and State: Littleton, CO

Scope of Project: The purpose of this award is to develop a comprehensive strategic plan and performance scorecard for the organization. The objective is to create a dynamic, forward-looking plan that aligns with the organization’s mission and addresses current and future educational challenges

The awarded vendor will provide the following implementation of services to include but not be limited to the following:

- Establish a clear roadmap that aligns with the mission, goals and evolving priorities, while providing measurable indicators to track progress and ensure accountability. As the education landscape evolves, the current and future challenges must be considered and addressed to ensure that the strategic plan remains relevant.

Scope of Contract:

- Term of Contract: April 2, 2025 – April 1, 2026
- Amount to be Awarded: \$87,780.00
- Method of Award: Request for Proposal

Funding Source: State

Summary of Selection Process:

A comprehensive selection process was evaluated according to the criteria stated in the solicitation to award contract.

Scoring Criteria:

- A. Technical Factors (40%)
- B. Management Factors (25%)
- C. Cost Factors (35%)

This item references Goals 1, 2, 3, 4, 5 and 6 of the *Mississippi Board of Education Strategic Plan*.

Note: The contract/attachments are made available for public inspection. Please contact the [Office of Public Reporting](#) to request public records pertaining to the intent to award.

Offerors who responded to this RFP have an opportunity to request that the procuring Agency reconsider its intent to award the contract to a specific offeror or offerors. Offerors are reminded that any requests for reconsideration of this decision must be submitted MDE's Office of Procurement, attention Monique Corley, Director at ProcurementQnR@mdek12.org and the Director of OPSCR, attention Amelia Gamble at Amelia.Gamble@dfa.ms.gov within three (3) business days after the issuance of this notice or no later than February 24, 2025. Offerors may reference the Public Procurement Review Board Office of Personal Service Contract Review Rules and Regulations, Rule 5.6.3, for instructions on how to make a request for reconsideration. 12 Miss. Admin. Code Pt. 9, R. 5.6.3.

It shall be the sole responsibility of the requesting offeror to ensure the request is timely received by all required parties. Failure to timely request reconsideration in compliance with this Section results in waiver of any claim an offeror may have as to the Agency's decision to award the contract.

Vendors are reminded that the Agency Procurement File is available on the Agency website at [MDE Bid Announcements – Procurement](#).

Evaluation Committee Report

MS Department of Education (MDE)
Strategic Planning and Performance Scoreboard

Request for Proposals
RFx # 3120003047

EVALUATION COMMITTEE REPORT

The MDE received proposals from the following Offerors: See attached Registry

Offerors 1, 3, 5, 6, 8, 9, 10, 15, 17, 18, and 19 were deemed non-responsive and/or non-responsible. The evaluation committee did not evaluate Offeror s1, 3, 5, 6, 8, 9, 10, 15, 17, 18, and 19's proposals. The remaining offerors proposals were evaluated and received the following scores:

Offeror Name	Management Score	Technical Score	Cost Score	Overall Score	Overall Rank
Studer Education	103	146	188.64	437.64	1
Cognia	98	129	140.34	367.34	2
Public Consulting Group	107	160	85.50	352.50	3
Learner's Edge	90	122	132.72	344.72	4
Lumen Impact	74	67	181.98	322.98	5
Anlar LLC	78	112	122.10	313.04	6
MGT Impact Solutions	92	126	48.42	266.42	7
James Stephen Price	31	35	57.36	123.42	8

The Agency intends to award contract(s) to: **Studer Education, LLC**

The intended awardee(s) was selected because: **Studer Education, LLC achieved the highest overall score.**

Evaluation Committee Members and Advisors

Name	Job Title	Member or Advisor	State Employee or Non-State Employee*
Dr. Lance Evans	Superintendent	Member	State Employee
Holly Spivey	Chief of Gov Relations, Internal & External Affairs	Member	State Employee
Jean Cook	Chief of Communications	Member	State Employee
Dr. Donna Boone	Chief of Academic Ed	Member	State Employee
John Kraman	Chief Information Officer	Member	State Employee
Dr. Paula Vanderford	Chief Accountability Officer	Member	State Employee

*The *curriculum vitae* of all non-state employees, evaluation committee scoresheets, record of discussions, and post-evaluation affidavits are attached hereto. The full Agency Procurement File is available for public inspection at <https://mdek12.org/procurement/rfp/>.

Any unsuccessful offeror may request reconsideration of the Agency’s intent to award the contract in accordance with Section 6.9.3 of the *PPRB OPSCR Rules and Regulations*.

Effective September 6, 2024

REGISTER OF PROPOSALS: Strategic and Planning Scoreboard - RFX #3120003047

DUE DATE OF PACKETS: February 5, 2025

TIME PACKETS DUE: 2:00 p.m.

#	Date Received	Name of Offeror/Recipient	Method of Delivery	Response Received by	Received Late? (Record time for LATE submissions)
1	2/3/2025	Martin's Career Coaching & Learning Little People	FedEX	L. Washington	NO
2	2/3/2025	MGT Impact Solutions	MAGIC	L. Washington	NO
3	2/3/2025	Engage Learning, LLC	MAGIC	L. Washington	NO
4	2/5/2025	Public Consulting Group	MAGIC	L. Washington	NO
5	2/5/2025	WestEd	MAGIC	L. Washington	NO
6	2/5/2025	Academic Development Institute	MAGIC	L. Washington	NO
7	2/5/2025	Cognia	MAGIC	L. Washington	NO
8	2/5/2025	Berry Dunn McNeil Parker	MAGIC	L. Washington	NO
9	2/5/2025	LMcIntosh Career Consulting	MAGIC	L. Washington	NO
10	2/5/2025	The Boston Consulting Group	MAGIC	L. Washington	NO
11	2/5/2025	Learner's Edge	MAGIC	L. Washington	NO
12	2/5/2025	Lumen Impact	MAGIC	L. Washington	NO
13	2/5/2025	Studer Education	MAGIC	L. Washington	NO
14	2/5/2025	James Stephen Price	MAGIC	L. Washington	NO
15	2/5/2025	Research Triangle Institute	MAGIC	L. Washington	NO
16	2/5/2025	Anlar LLC	MAGIC	L. Washington	NO
17	2/5/2025	Education First Consulting	MAGIC	L. Washington	NO
18	2/5/2025	Advanced Learning Partnerships	MAGIC	L. Washington	NO
19	2/5/2025	ILO Group LLC	MAGIC	L. Washington	NO

DEBRIEFINGS

List of offerors requesting a debriefing and when each debriefing was completed; any other documentation

Applicable: YES NO

CANCELLATION OR REJECTION OF INDIVIDUAL PROPOSALS OR QUALIFICATIONS

Notice of cancellation and proof of distribution; required written determination; correspondence regarding rejection of individual proposals or qualifications; information regarding disposition of proposals or qualifications

Applicable: YES NO



Monique Corley, Director
Office of Procurement

February 24, 2025

Ms. Pam Sheley, Executive Director
Academic Development Institute
121 N. Kickapoo Street
Lincoln, IL 62656
Email: psheley@adi.org

Dear Ms. Sheley:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

The Mississippi Department of Education (MDE) greatly appreciates your interest in working with the State of Mississippi. Please review the <https://mdek12.org/procurement/rfp/> often to take advantage of other contract opportunities.

Sincerely,

Monique Corley
Procurement Director

Central High School Building
359 North West Street
P.O. Box 771
Jackson, MS 39205-0771

Phone (601) 359-5716

www.mdek12.org



Monique Corley, Director
Office of Procurement

February 24, 2025

Mr. Amos Fodchuk, President
Advanced Learning Partnerships, Inc.
P.O. Box 17254
Chapel Hill, NC 27516

Email: amos@alplearn.com

Dear Mr. Fodchuk:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

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Sincerely,

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Procurement Director

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P.O. Box 771
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Monique Corley, Director
Office of Procurement

February 24, 2025

Ms. Kelsey Clark, Managing Director and Partner
The Boston Consulting Group, Inc.
2501 N. Harwood St. Suite 2300
Dallas, TX 75201

Email: Clark.Kelsey@bcg.com

Dear Ms. Clark:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

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Sincerely,

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Procurement Director

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P.O. Box 771
Jackson, MS 39205-0771

Phone (601) 359-5716

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Monique Corley, Director
Office of Procurement

February 24, 2025

Mr. Charles Leadbetter, Principal
Berry, Dunn, McNeil, and Parker, LLC
2211 Congress Street
Portland, ME 04102

Email: cleadbetter@berrydunn.com

Dear Mr. Leadbetter:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

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Sincerely,

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Procurement Director

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P.O. Box 771
Jackson, MS 39205-0771

Phone (601) 359-5716

www.mdek12.org



Monique Corley, Director
Office of Procurement

February 24, 2025

Mr. Carl Christopher, Chief Finance & Revenue Officer
Education First Consulting, LLC
P.O. Box 22871
Seattle, WA 98122

Email: cchristopher@education-first.com

Dear Mr. Christopher:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

The Mississippi Department of Education (MDE) greatly appreciates your interest in working with the State of Mississippi. Please review the <https://mdek12.org/procurement/rfp/> often to take advantage of other contract opportunities.

Sincerely,

Monique Corley
Procurement Director

Central High School Building
359 North West Street
P.O. Box 771
Jackson, MS 39205-0771

Phone (601) 359-5716

www.mdek12.org



Monique Corley, Director
Office of Procurement

February 24, 2025

Mr. Matt Bachman, Chief Financial Officer
Engage! Learning, LLC
8911 North Capital of Texas Hwy, Ste 4200-1065
Austin, TX 78759

Email: submissions@engage2learn.org

Dear Mr. Bachman:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

The Mississippi Department of Education (MDE) greatly appreciates your interest in working with the State of Mississippi. Please review the <https://mdek12.org/procurement/rfp/> often to take advantage of other contract opportunities.

Sincerely,

Monique Corley
Procurement Director

Central High School Building
359 North West Street
P.O. Box 771
Jackson, MS 39205-0771

Phone (601) 359-5716

www.mdek12.org

February 24, 2025

Ms. Cerena Parker, Chief Operating Officer
ILO Group, LLC
10 Dorrance St., Suite 700
Providence, RI 02903

Email: cparker@ilogroup.com

Dear Ms. Parker:

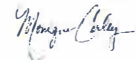
Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10 of Section 5.2, Proposal Evaluation, it states:

5.2 Acknowledgment of Amendments be The MDE reserves the right to amend this solicitation at any time. Should an amendment to the solicitation issued, it will be posted to the MDE website at <https://mdek12.org/procurement/rfp/> under MDE Bid Announcements section. Offerors must acknowledge receipt of any amendment to the solicitation by signing and returning the amendment acknowledgment form. Please monitor the website for amendments to the solicitation.

The Mississippi Department of Education (MDE) greatly appreciates your interest in working with the State of Mississippi. Please review the <https://mdek12.org/procurement/rfp/> often to take advantage of other contract opportunities.

Sincerely,



Monique Corley
Procurement Director



MISSISSIPPI
DEPARTMENT OF
EDUCATION

Ensuring a bright future for every child

Monique Corley, Director
Office of Procurement

February 24, 2025

Ms. Deloise McIntosh, Chief Executive Officer
LMcIntosh Career Consulting
107 Wethersfield Dr.
Madison, MS 39110

Email: lmcintoshconsulting@gmail.com

Dear Ms. McIntosh:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation:

- Missing Appendices A, H, G & F
- Missing Acknowledgement of Amendment No. 1
- Missing Acknowledgement of Amendment No. 2

On page 17 of Section 6.12, Proposal Evaluation, it states:

Compliance Phase - In this pass or fail phase of the evaluation process, all proposals received will be reviewed by the procurement officer and/or designee to determine if the following mandatory requirements of this solicitation have been satisfied:

1. Proposal received by submission deadline;
2. Required proposal submission format followed;
3. Minimum Qualifications met;
4. Proposal Cover Sheet (Appendix A);
5. Production/Detailed Service Plan;
6. Resumes for Key Personnel;
7. References;
8. Cost Data; and
9. All Required Signed Forms (if applicable).

Failure to comply with these requirements may result in the proposal being eliminated from further consideration. Offerors passing the Compliance Phase will be evaluated further.

The Mississippi Department of Education (MDE) greatly appreciates your interest in working with the State of Mississippi. Please review the <https://mdek12.org/procurement/rfp/> often to take advantage of other contract opportunities.

Sincerely,

Monique Corley
Procurement Director

Central High School Building
359 North West Street
P.O. Box 771
Jackson, MS 39205-0771

Phone (601) 359-5716

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Monique Corley, Director
Office of Procurement

February 24, 2025

Dr. Erica J. Littleton, Chief Education Officer
Martin's Career Coaching and Learning Little People
P.O. Box 310994
Birmingham, AL 35231

Email: ericajewel@learninglittlepeople.com

Dear Dr. Littleton:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

The Mississippi Department of Education (MDE) greatly appreciates your interest in working with the State of Mississippi. Please review the <https://mdek12.org/procurement/rfp/> often to take advantage of other contract opportunities.

Sincerely,

Monique Corley
Procurement Director

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P.O. Box 771
Jackson, MS 39205-0771

Phone (601) 359-5716

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Monique Corley, Director
Office of Procurement

February 24, 2025

Mr. Eve Van Devender, Sr., Contracting Officer
Research Triangle Institute
P.O. Box 12194
3040 East Cornwallis Rd.
Research Triangle Park, NC 27709

Email: evevandevender@rti.org

Dear Mr. Van Devender:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

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Monique Corley, Director
Office of Procurement

February 24, 2025

Ms. Kelsey Krausen, Project Director
WestED
730 Harrison St., Suite 500
San Francisco, CA 94107

Email: id-help@wested.org

Dear Ms. Krausen:

Thank you for submitting a response to the solicitation to provide services for Strategic and Planning Scoreboard Services. After a thorough pre-review, the agency regrettably rejected your proposal.

The proposal did not meet the following requirements below as specified in the solicitation. On page 10, Section 6.12, Proposal Evaluation, it states:

The Offeror must provide: Evidence and proof that the vendor is in good standing with Mississippi Code Annotated § 79-4-15.01 regarding authorization to transact business in Mississippi.

The Mississippi Department of Education (MDE) greatly appreciates your interest in working with the State of Mississippi. Please review the <https://mdek12.org/procurement/rfp/> often to take advantage of other contract opportunities.

Sincerely,

Monique Corley
Procurement Director

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