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To: Nina Lennon, Interdepartmental Project Manager
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From: Daniel W. Majcher, Assistant Director, Special Projects, Department of
Administration, on behalf of the Review Team *Daniel W. Majcher*

Date: May 28, 2021

Re: Final Evaluation Memo (Technical & Cost) for RFP 21000563 - K-12 School and
Higher Education Reopening Plan Consulting Services

I. Introduction

The Rhode Island Department of Administration Division of Purchases, on behalf of the State of Rhode Island, issued a request for proposals (“RFP”) from potential vendors/consultants with respect to K-12 School and Higher Education Reopening Plan Consulting Services. The RFP was issued on or about March 23, 2021, with a submission date of April 13, 2021.

By way of background, the RFP stated as follows:

Priorities – Health and Recovery

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

COVID-19 Pandemic Response

Since the pandemic emerged in 2020, the State of Rhode Island continues to employ an aggressive and targeted response to address the wide array of impacts the pandemic

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

COVID-19 Funding

Under the Coronavirus Aid, Relief, and Economic Security (CARES) Act, the State received \$1.25 billion through the Coronavirus Relief Fund. The State can use these funds for necessary expenses related to the pandemic that were incurred between March 1, 2020 and December 30, 2020 and were not accounted for in the state budget as of March 27, 2020. The State is also eligible for Federal Emergency Management Agency (FEMA) funding for certain expenses incurred because of the public health emergency. Also, the State is receiving at least \$300 million in additional federal funding that is allocated to various state agencies to provide grants and fund initiatives during this pandemic.

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

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

The Rhode Island public elementary and secondary education system:

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

The Rhode Island Department of Education (RIDE), Rhode Island Department of Health (RIDOH), and the public Local Education Agencies (LEAs) – which include public school districts, charter schools/collaboratives, and state-run schools – worked hard to ensure delivering on the promise of a high-quality education in the 2020-2021 school year.

RIDE provided the LEAs with planning guidance and asked that each prepare for a full range of scenarios – from full in-person to distance learning. RIDE developed reopening

metrics to determine which scenario could be most safely implemented and stood up an Education Operations Center to support school communities in real time as issues arise.

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

In response, five proposals were received from the following vendors on or before the submittal deadline:

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

A “Review Team,” with significant, diverse experience was assembled to conduct a comprehensive evaluation of the above-mentioned proposals. The review team consisted of the following members:

The Honorable Charles A. Lombardi, Mayor of North Providence
Kristen Danusis, Director of the Education Operations Center, Rhode Island Department of Education
Tom McCarthy, Executive Director, Covid Response, Rhode Island Department of Health
Daniel W. Majcher, Esq., Assistant Director, Special Projects, Department of Administration

II. Technical Review Process

As stated in the RFP, the technical evaluation of each vendor was performed by using the following criteria:

<u>Criteria</u>	<u>Points</u>
Staff Qualifications	20 Points
Capability, Capacity, and Qualifications of the Vendor	20 Points
Work Plan	15 Points
Approach/Methodology	15 Points
Total Possible Technical Points	70 Points

As required by the RFP, any technical proposals scoring less than 50points (out of 70 points) would not have the cost component either opened or evaluated and the proposal would be dropped in its entirety from further consideration.

The Review Team was provided each of the proposals by the Division of Purchase. Each member of Review Team reviewed the proposals and met as a group on April 16, 2021. The team meeting was to discuss and score the proposals on a consensus basis. All members were in attendance. A full and comprehensive evaluation of the written proposals took place. Additionally, the Review Team contacted three (3) references for each vendor and there were no red flags identified.

After this initial evaluation, because of the high level, important nature of this project, the Review Team decided to conduct interviews of the vendors who submitted responsive written proposals. The purpose of the interview was to look beyond the written proposals and hear from each of the vendors.

The Review Team contacted the Division of Purchases, who reached out to each of the three qualifying proposals (WestEd, MGT Consulting and ILO Group) and arranged for a remote presentation on Zoom on April 26, 2021. Each vendor was given approximately one hour to present its proposal and answer questions from the Review Team.

After completion of the interviews, the Review Team met to finalize the technical scoring. This final technical consensus scoring is reflected in the technical evaluation memo and is repeated here below. Based on the technical evaluation, the team is requested and received cost proposals for three of the five vendors (ILO, WestEd and MGT Consulting).

III. Technical Evaluation Summary and Scores

For the technical evaluation, the Review Team scored the proposals on a consensus basis as follows:

Vendor	Staff Qualifications	Capability, Capacity,Qualficiations	Work Plan	Approach/Methodology	Total
ILO Group, LLC	19	16	14	14	63
WestEd	19	18	13	12	62
MGT Consulting	18	14	11	8	51
Education Safety Solutions	5	5	3	3	16
Empower Schools	0	3	3	3	9

Below is a summary of the Review Team’s comments and technical scores for each vendor by category:

A. ILO Group, LLC

- 1. Staff Qualifications** (Consensus Score = 19 points) – Significant experience in education, public health and all ancillary areas. Provided a detailed organizational chart addressing all aspects of the project with a very strong team. Proposed staff appears to have an understanding of Rhode Island education and health systems and have worked in Rhode Island. Staff also has significant national experience. The RIDE representative on the evaluation team was very familiar with the education work of Dr. Avossa and spoke highly. However, Dr. Avossa did not appear as part of the interview. Additionally, unlike one of the other vendors, ILO Group did not have a pediatrician/medical doctor as part of the team (not required by the RFP, but a nice feature.) Overall a very strong team of individuals. The review team weighed the local presence of this vendor heavily.
- 2. Capability, Capacity, Qualifications** (Consensus Score = 16) – While the individuals on the team have significant experience, on paper, as a group it appears this team has been only together for a short time and recently incorporated. However, as part of the interview, ILO Group addressed this concern and stated that the team has worked together for the past decade, albeit with other entities. The proposal put forth strong examples of prior work and many good references. Therefore, while the Review Team acknowledges the national experience and past work performed, there was some hesitation because this vendor does not have a long-term track record delivering as a single organization. On the other hand, the individuals on the team appear to be Rhode Island based (which was important to the Review Team) and have a familiarity with the local situation that would provide an advantage and enhances the capability of this vendor. Therefore, the Review Team weighed the pros and cons stated above in this category and deducted 4 points accordingly.
- 3. Work Plan** (Consensus Score = 14 Points) – Very strong and detailed workplan addressing all aspects of the RFP. Very detailed around municipal learning plans and the strongest proposal in that area. Appear to have a good understanding of the work already done and how to move forward. Also, stated will partner with Nail Communications (local firm) and proposed a subject matter expert in communications (Jeremy Crisp). During the interview, portrayed a high level of energy as well and a passion for Rhode Island. A little high level in in a couple of spots, so 1 point was deducted accordingly.
- 4. Approach/Methodology** (Consensus Score = 14) Despite being a less mature organization, this vendor put together a thoughtful and detailed approach and methodology.

Total Consensus Score – 63 Points

B. WestEd

- 1. Staff Qualifications** (Consensus Score = 19 points) – Proposed team represents a partnership between WestEd, the Public Health Institute (PHI) and the National Institute on Out-of-School Time (NIOST). This combined team is very qualified in all areas required by the RFP. This team has also completed work in Rhode Island and directly for RIDE and includes a team member who previously worked for RIDE. Moreover, the proposed staff includes a pediatrician. Deducted a point because appears to be missing some communications expertise.
- 2. Capability, Capacity, Qualifications** (Consensus Score = 18) – Significant experience in both education and public health. Have done work in Rhode Island, including work directly for RIDE. Strong references, especially from RIDE. This vendor has done work in all states and, along with its partners, appears to be fully capable, qualified and has the capacity to perform this engagement. Just like ILO Group, this vendor represents a new partnership between WestED and the Public Health Institute. The Review Team scored this vendor a strong 18 in this category.
- 3. Work Plan** (Consensus Score = 13 Points) – A detailed workplan addressing all aspects of the RFP except for a communications plan. Accordingly, because the communications in this project is so important for the entire State, 2 points were deducted.
- 4. Approach/Methodology** (Consensus Score = 12) – Overall good, but have some high level, generic language and deducted accordingly.

Total Consensus Score – 62 Points

C. MGT Consulting

- 1. Staff Qualifications** (Consensus Score = 18) Staff has substantial experience in education field. MGT is partnering with Public Works Consulting. While Public Works appears to have significant general consulting experience, it is not clear that this firm has significant public health consulting experience. Thus, a couple of points were deducted.
- 2. Capability, Capacity, Qualifications** (Consensus Score = 14) – MGT has relevant experience in other states, but has little or no experience related to the education system in Rhode Island. MGT, through its partner Public Works, relied heavily on its experience with the Department of Labor and Training (DLT) to

complete a legislatively mandated strategic plan. While the reference related to the DLT provided positive comments about this work and specifically Mr. Schnurer, it was not in the area of education (with RIDE) or in Public Health (with RIDOH).

3. Work Plan (Consensus Score = 11) – MGT combined its workplan and approach/methodology for each category for the RFP. As a result, each category was methodically addressed, albeit high level and generic in some places. In the interview, the MGT team admitted that they did not have a firm handle on what the State was looking for in RFP and proposed gathering information to assess the needs of the State. While information gathering is an important step, the State was not confident that MGT could hit the ground running. Several places in this category were generic, vague and high level. Thus, the Review Team deducted accordingly.

4. Approach/Methodology (Consensus Score = 8)

Same comments as #3 (these two categories were combined for each area of the RFP). Approach/methodology was generic, vague and high level in places. Thus, the Review Team deducted accordingly.

Total Consensus Score – 51 points

D. Education Safety Solutions

5. Staff Qualifications (Consensus Score = 5 points) – Limited information and high level. The proposed team is not well-rounded in the areas required by the RFP. Seems like this company may be focused on other areas including healthcare and not specifically education. Therefore, significant points deducted.

6. Capability, Capacity, Qualifications (Consensus Score = 5 Points) – Experience and references seems to be limited to smaller engagements with individual schools (not school districts). No direct experience in Rhode Island schools. Not confident that this vendor has the capacity to handle this engagement involving the entire State of Rhode Island and all of its districts.

7. Work Plan (Consensus Score = 3 Points) -- Very high level and generic. Does not really identify and challenges or hurdles. Focuses on work already completed in Rhode Island. Therefore, significant points were deducted accordingly.

8. Approach/Methodology (Consensus Score = 3) – Very high level and generic.

Total Consensus Score – Non-responsive (16 Points)

E. Empower Schools

- 1. Staff Qualifications** (Consensus Score = 0) – Non-responsive. Did not attach resumes as stated in the proposal. Contacted the Division of Purchases in case the attachment was unintentionally not provided, but apparently this attachment was not submitted.
- 2. Capability, Capacity, Qualifications** (Consensus Score = 3 points) Non-Responsive. Did not provide reference and contact information for references. Extremely high level.
- 3. Work Plan** (Consensus Score = 3 points). Only focused on one aspect of the RFP related to learning loss, but did not address the other required elements of the RFP.
- 4. Approach/Methodology** (Consensus Score = 3 points) – High level and limited focus to only one aspect.

Preliminary Total Consensus Score – Non-responsive (9 points)

IV. Technical Review Recommendation

The Review Team provided the preliminary consensus technical scores to the Division of Purchases as follows:

<u>Vendor</u>	<u>Total</u>
ILO Group, LLC	63
WestEd	62
MGT Consulting	51
Education Safety Solutions	16(non-responsive)
Empower Schools	9(non-responsive)

Both ILO Group and WestEd appear to be well-qualified from a technical standpoint while MGT Consulting barely passed the threshold to have the cost considered. After the technical evaluation and interviews, ILO Group has a slight one-point advantage.

Based on this comprehensive technical evaluation, the Review Team requested that the Division of Purchases forward the cost proposals for the three (3) vendors who have achieved the 50 point threshold out of 70 technical points in order for the Review Team to complete its evaluation.

V. Cost Review Process

Upon review of the three (3) cost proposals, it was determined that the level of effort proposed by the three (3) vendors was incomparably different, with one vendor proposing approximately 3,500 hours (MTG), one about 4,000 hours (WestEd) and another 35,700 hours (ILO). Because of this significant difference, it was impossible to compare the cost proposals. Apparently, the broad and vague nature of the RFP created a fundamental misunderstanding among the vendors. Therefore, the Review Team met and discussed the situation.

In an attempt to remedy the situation and not cancel the solicitation as time remains a critical factor, the Review Team determined the best way to proceed was to:

1. Attempt to review the required components of the project provided in the RFP, and estimate the level of effort anticipated by the State to complete this project.
2. Attempt to create a spreadsheet with the range of estimated level of effort hours for each component and send to the finalist vendors to resubmit best and final pricing based on a common understanding of the size of the project.
3. Attempt to clarify and confirm with the finalist vendors that the vendor could deliver the level effort estimated by the State and confirm that the work plan and approach provided in the technical proposal would not change based on the expected level of effort.

The Review Team contacted the Division of Purchases to work through this process for resubmission of the cost proposals. On May 5, 2021, Nina Lennon on behalf of the Division of Purchases, emailed the vendors with the required spreadsheet, attached as **Appendix A**. The deadline for resubmission of pricing was on May 7, 2021 at 1PM.

The Review Team received the level of effort and best and final submissions from the three vendors. The vendors submitted itemize cost which are summarized as follows:

<u>Vendor</u>	<u>Total Hours</u>	<u>Average Blended Rate</u>
WestEd	27,135	\$123.45
ILO, Group	28,669	\$227.84
MGT Consulting	23,650	\$229.85

Despite the Review Team's effort, there is still a significant disparity among the proposals. The best and final offer process resulted in ILO Group cutting its proposed services, while WestEd offers an increased and more robust implementation, but requires further discussion with the State. Moreover, WestEd's fully blended rate is more than 50% lower than the other two vendors and is lower than originally submitted. Such a significant difference in the rate is troubling for two reasons: 1) It is unclear whether WestEd understands the requirements; and 2) such a lower rate may mean that lower level staff would be completing the work.

Further, while all vendors confirmed that their proposed work plan, approach and methodology would not change in response to the updated level of effort put forth, but all vendors qualified their best and final cost submission responses as follows:

A. ILO Group

In light of the attempt to find commonality, ILO Group was faced with reducing its proposed services. ILO Group had initially proposed over 35,700 work hours, but now has submitted a reduced level of hours in its best and final following the State's estimations, but with a corresponding reduction to the services being provided by ILO Group. Specifically, ILO Group provides:

ILO Group will also decrease the level of effort related to the evaluation portion of component v (program design, analysis and evaluation backed with empirical data for municipal programs, summer catch up programs and state school reopening). We will reduce the level of effort required of the Harvard evaluation team during the design and implementation phase of the evaluation process, and instead rely on the Harvard Strategic Data Project Fellow to provide necessary capacity within this component. The Harvard evaluation team will continue to support the evaluation aspect of the project, but will not staff and participate in the design and implementation stages as originally described. Lastly, ILO Group will decrease the level of effort with regards to project management within component i (COVID testing planning, organization and communication as a part of statewide full in-person public school reopening including, but not limited to, underserved students).

The RFP did not explicitly name vaccination issues as part of the workstreams, but as described in our interview, we believe that vaccine confidence is critical to reopening efforts. We are removing the effort originally envisioned for vaccine confidence to align with the reduced hours. This includes the removal of the vaccine confidence report and its related research, national level of support, and communications support, which are removed from the scope of work due to level of efforts limits.

Once again, because the original RFP was extremely broad and unclear as to the requirements, the Review Team is concerned that the work needed to be done and the final pricing submitted is not based on a full understanding of the requirements. ILO's submission

highlights this issue when it simply cuts services to achieve the State’s estimated level of effort. As a result, the Review Team is concerned that important services requested by the State would not be provided as a result of this reduction in services provided by ILO Group.

A. WestEd

When asked to confirm that the proposed work plan, approach and methodology does not change based on the anticipated level of effort provided in Appendix A, WestEd stated:

No. The attached revised Best and Final Pricing estimate reflects additional capacity that our team can provide to support RI in carrying out the scope of work in year 1. Based on this expanded cost estimate, while our overall approach remains the same, our team is prepared to provide more robust implementation support across tasks, beyond what was described in our original proposal workplan. To ensure that these expanded supports align with RI's anticipated needs, a discussion about more detailed scope assumptions would be helpful to inform a revised workplan. [Emphasis added]

WestEd states they are willing to increase to the level of effort necessary, but provided: “To ensure that these expanded supports align with RI's anticipated needs, a discussion about more detailed scope assumptions would be helpful to inform a revised workplan.” Based on this language, it appears that further discussion would be necessary, which concerns the Review Team that the proposal is not based on a solid understanding of the requirements or that the scope of work still remains unclear. Thus, it appears that the RFP, does not provide enough information and a tight enough scope to allow the vendors to appropriately submit level of effort and pricing. Further, such a significantly lower blended rate compared to the other two vendors and in its original submission creates concern as to the understanding of the requirements and whether the personnel assigned to tasks would be appropriate.¹

C. MTG Consulting

MTG Consulting also confirmed that their proposed work plan, approach and methodology would not change in response to the updated level of effort put forth. However, MTG Consulting also provides in the answer to #1 on the best and final spreadsheet:

Our detailed response includes over 22,000 project hours, including the individuals referenced in the original proposal, as well as additional consultants and experts in education and health from our national practices, as well as three Rhode Island-based consultants we will recruit and onboard based on a situation assessment of critical needs that will be conducted in the first two weeks after contract execution. [Emphasis added].

Once again, it appears that further discussion would be necessary.

¹ Such a vastly lower blended rate compared to almost the same rate proposed by the other two vendors begs the question of whether the ILO Group’s cost submission is responsive.

V. Cost Analysis and Recommendation

In hindsight, it appears the scope of work for the original RFP was too broad and vague. This led to a disparity among vendors as to the level of effort to be performed, which was reflected in greatly disparate cost proposals both originally and after an attempt to equalize the level of effort through a best and final offer process. The Department attempted to remedy the situation by issuing a clarification of the expected level of effort in terms of hours, along with a request for best and final pricing. However, this attempt was unsuccessful, and it still appears that the cost provided by the three vendors is not comparable. Therefore, the Review Team is unable to score the cost proposals accordingly and is not confident in issuing a recommendation for an award to a single vendor.

Providing these critical services is necessary to protect Rhode Island's schoolchildren, one of the State's most vulnerable populations. These services need to begin immediately and over the summer in preparation for the start of school in the fall. The future of Rhode Island's education system depends on it. The Review Team believes that no additional time should be wasted on this procurement or a rebid.

After an extremely comprehensive technical review (as outlined above), the Review Team identified two technically superior vendors (ILO Group and WestEd) who are very capable of providing these important services to the State. Both of their proposals were thoughtful and detailed. The technical scores of the two vendors were virtually equal, while MTG was far below.²

Therefore, the Review Team recommends the selection of ILO Group and WestEd to participate on a State Master Price Agreement to provide the services contemplated by the broad and vague RFP for K-12 School and Higher Education Reopening Plan Consulting Services. Further, the Review Team recommends selection to the two (2) highest scoring vendors.

After tentative selection, the State's project manager would accordingly divide the components stated in the RFP among the two qualified vendors as appropriate. The rates provided in the best and final would serve as maximum rates and the State would have the benefit of assigning specific, discreet work to each vendor as necessary.

² MTG also had the highest rates.