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December 19, 2018

California State PTA (CAPTA) is seeking proposals to develop a business plan for a new online family engagement and training module to include a pilot phase. This module will help equip district and school personnel with the knowledge and tools to meaningfully engage families in the development of the district Local Control Accountability Plan (LCAP) as required by Priority 3 (Ed Code 52060) within the Local Control Funding Formula.

We are seeking a consultant(s) with experience in developing business plans and that ideally has experience in the provision of educational content including online Learning Management Systems (LMS) and in-person training formats. This Request for Proposal (RFP) contains information about the organization and services required.

Proposals will be evaluated by the following criteria:

1. **Completeness of the plan** – Does the consultant have the ability to develop a robust business plan for the implementation of an education module to be presented in multiple formats, both in-person and electronically?
2. **Experience** – Does the consultant or consultant agency have a track record of producing quality work in a timely and cost-effective manner?
3. **Current and Forward-Looking** – Does the consultant agency have a demonstrated understanding of current trends in adult education content provision and business plan and project management efficiencies?

The specifications of the request for proposal are attached. An electronic copy of your proposal must be received at the California State PTA office by **January 21, 5:00 p.m.** PST and should be delivered to Michelle Eklund at meklund@capta.org. Hard-copy proposals are welcome, but will not be considered an official submission. At the sole discretion of California State PTA, selected bidders may be invited to make oral and visual presentations to an evaluation committee after submission of proposal. Presentations will be only with California State PTA representatives and key representative of invited companies. Presenters will be allowed a minimum of five days' notice to prepare.

Sincerely,

Sherry Griffith, Executive Director

Request for Proposal

Online LCAP Education Module Business Plan

California State PTA

December 18, 2018

REQUEST FOR PROPOSAL

GENERAL INFORMATION

This Request for Proposal (RFP) is not a commitment or contract of any kind. California State PTA reserves the right to pursue any and/or all ideas generated by this request. Costs of developing the proposals are entirely the responsibility of the applicants and shall not be reimbursed. California State PTA reserves the right to reject any and all proposals and/or terminate the RFP process if deemed in the best interest of California State PTA. Further, while every effort has been made to ensure the information presented in this RFP is accurate and thorough, California State PTA assumes no liability for any unintentional errors or omissions in this document. California State PTA reserves the right to waive any requirements listed in the RFP when it determines that waiving a requirement is in the best interest of California State PTA.

Objectives for Project:

Develop an actionable business plan that helps inform the deployment of a self-sustaining and revenue generating LCFF/LCAP module. The module is intended to be delivered through an online Learning Management System (LMS). The primary client for this module will be district and school personnel that are responsible for the engagement of parents and families within the LCAP process. The resulting business plan will help inform the deployment of the LMS and subsequent development of the LCFF/LCAP module to build on CAPTA's successful School Smarts Program.

School Smarts Program

The School Smarts Parent Engagement Program is a fee for service family engagement program that currently offers academies designed to educate parents on how to support their children's education and to advocate on their behalf as well as the school community. The program is locally administered with State PTA support and training. The business plan developed through this RFP will help CAPTA expand its offerings to include a module on LCFF/LCAP, as part of our current academies and as a stand-alone educational module.

Key considerations that will need to be addressed as part of the business plan.

- Business Model
 - Provide options of plans for achieving sustainability and growth through a net gain in revenues for both a stand-alone and School Smart Program integrated educational module.
- Delivery System
 - Determine a digital delivery system model that is user-friendly and that limits maintenance costs and demands on CAPTA resources
 - Include options to integrate into current in-person academy series program and an online option

- Ensure that materials can be updated efficiently and in-house at minimal cost, without the need for any substantial ongoing consulting other than possible technical support
- For online version, ensure student tracking, reporting, grading and full content management, with data analytics that are robust and relational in nature.
- Content and Curriculum
 - The delivery system will inform the development of the content and curriculum. Support access to materials that are similar in both print and online, though exact structure and organization may vary.
- Training and Certification
 - Factor in a strategy for training facilitators and online system managers and users on the use of the curriculum.

SCOPE OF WORK AND BUDGET

Business Model Development (Budget \$8,000-\$10,000)

- Business forecast and strategies for deploying, pricing, and marketing the LCFF/LCAP module
- Provide recommendations for basic, moderate and deluxe options that account for staffing support, media development and breadth of content.
- Determine Learning Management Systems (LMS) that helps reduce high costs of in-person training of instructors and facilitators and that provides greater accessibility to those in more remote areas
- The LMS should be a complete system that provides digital access to: courses, content, assessment tools, secure access for users and managers, certification of learning, and video conferencing capability.

Initial Timelines:

- RFP released in December 2018
 - **January 4, 2019**– Interested Applications Q & A Call – 10-11am – Call In # 1- 641-715-3276 – Access Code 604265#
 - **January 21 , 2019** – Deadline for Submissions
 - **Reviewed by February 12, 2019**
 - Contract awarded by **February 19, 2019**
 - Implementation and Development Phase April-June 2019

BACKGROUND INFORMATION

California State PTA is a 501(c) 3 organization and its corporate headquarters is located in Sacramento. In addition to a staff of 19 in Sacramento, board members, committee members and others transact business primarily via telephone, email and website access.

California PTA is a leader in providing parents, schools and districts with tools to engage in meaningful partnership and decision-making to improve outcomes for all children.

We are part of the foundation of the California public-education system and a trusted messenger to millions of members, parents, families, educators and allied agencies throughout the state. We are part of National PTA, the nation's largest volunteer-led child-advocacy association working to drive improvements in the education, health and well-being of all children and families.

Parents are children's first teachers and we believe that parent involvement is essential throughout a child's educational experience. We believe that family is the basic unit of society responsible for the support and nurturing of all children, and we recognize that "the family" may be defined in many ways. We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education for each child.

A Board of Directors and Board of Managers govern California State PTA. The Board of Directors consists of elected and appointed officers and meets four times a year to conduct the business of the organization. The Board of Managers consists of 110 members, including the district presidents, and meets four times a year to coordinate California State PTA's statewide programs as well as conduct the business of the organization.

CAPTA Mission and Goals

The mission of California State PTA is to positively impact the lives of all children and families.

PTA Goals:

1. Represent, inform and mobilize members and the public to advocate for the education, health, safety and well-being of all children
2. Engage and empower our members and mentor the leaders of tomorrow
3. Strengthen our voice for all children by increasing membership
4. Promote and practice inclusiveness
5. Promote and build family engagement to foster positive outcomes for every child.

Award Winning School Smarts Parent Engagement Program

School Smarts is a fee-for-service program offered by CAPTA, and is an award-winning, research-based program that teaches parents how to help their children succeed in school. The program includes a seven-session Parent Academy with a comprehensive curriculum that fosters parent engagement in education. It encourages parents to advocate for a complete, high-quality education that includes the arts. The program is

generously supported by the William and Flora Hewlett Foundation, but recently began operating as a fee for service program to ensure sustainability.

Goals:

- Foster parent engagement in schools
- Support parents as children’s first teachers
- Be a catalyst for inclusiveness at schools
- Develop future parent leaders
- Encourage parents to advocate for a complete and quality education that includes the arts.

Topics that educate and empower parents are covered during the seven Parent Academy sessions, including understanding the education system, communicating effectively, advocating for a quality education, and how important parent involvement is for children and for schools. The Academies and materials are provided in English, Spanish, Chinese, Vietnamese, Tagalog and Arabic. During each session, parents also participate in art activities, which build a sense of community and underscore the importance of a complete education that includes the arts.

Potential Future School Smarts Program Content & Stand-Alone Module

We are requesting that the resulting business model address and support the future deployment of additional modules, though this proposal will need to focus on the deployment and marketing of a new LCFF/LCAP module. Additional modules that we hope to integrate in the future include:

- 1. Full or Half Day Training Module** to support the provision of onsite training at a school district or county office of education setting with parents from surrounding schools sites. Pre-session with involved administrators, teachers and other staff. Beginning and closing session delivered by the school district or county office representatives. Content delivery timing and pacing of the curriculum, facilitation, hands-on-activities and action planning and reporting out input and recommendations for next steps in the LCFF/LCAP process.
- 2. 2 hour Training Module** to be held at a school site or district or county office site. Brief beginning and closing session offered by school district or county office representatives. Facilitation, content delivery and curriculum, hands on activities and final action or recommendations for next steps in the LCFF/LCAP process.
- 3. Quarterly “Seasons of LCAP” Module** Four sessions geared to meet the four seasons of LCAP – Fall to Educate, Winter to Review, Spring to Engage, Summer to Reflect. This Module could be 2-4 hour delivery modules. Similar components as stated above.

4. **On Line Module** Geared to offering some of the On Site Curriculum and Activities Self-Paced and/or Guided. Using a format similar to those describe above but with modifications relevant to an on-line training module.
5. **Administrators and Teacher Module** – A 2-4 hour module specifically geared to administrators and teachers on how to effectively meet Priority 3 – Parent Involvement and Family Engagement. This would be a broader training opportunity applying the researched based standards for Family/School Partnerships and application of the rubric/assessment to effectively gauge success (see attached). This module would also apply to effectively using the Reflection Tool provided by the state to meeting Priority 3 and to assess and truly reflect whether Priority 3 is “Met or Not Met.”

California Education Landscape and what is currently offered

Understanding the California Education Landscape and what is currently offered in the area of Family Engagement training and LCFF/LCAP training models, modules, etc. We are seeking a consultant who can put that into the context of PTA developing a business model so we do not duplicate other efforts.

Price Points

We are seeking advice on price points and recommendations on how to effectively deliver each of the modules with the greatest cost efficiencies built in. These would be approximate price points based on the various module concepts. Having an approximate outline of basic, comprehensive and deluxe module cost and price points would be very helpful. Key here is to establish a pricing strategy that results in achieving the self- sustainability of the LMS strategy including staff support and system maintenance.

Marketing

We are seeking recommendations on how to effectively market the LCAP Parent and Family Engagement Training Modules. Specifically, the marketing strategy needs to focus on school district administrators who would purchase access for themselves and or staff members that are responsible for the engagement of parents, families and the community to meet LCFF Priority 3.

RFP COMMUNICATIONS

California State PTA Contact

The contact person for this procurement process is:

Michelle Eklund, Assistant Executive Director

California State PTA
2327 L Street
Sacramento, CA 95816-5014

Questions must be submitted via email to Michelle Eklund at meklund@capta.org by January 3, 2019 to ensure sufficient time to prepare responses.

CONTRACTOR RESPONSIBILITIES

The individual representative of the contractor who has contracting authority must sign each proposal. That individual will be the sole point of contact with regard to contractual matters. Vendors must certify that they are not currently under suspension by the State of California, any other state, regulatory commission, or the federal government. Vendors must acknowledge that, if they are currently under suspension, or if they owe delinquent taxes, their proposal may not be accepted or considered.

Rejection of Proposals

California State PTA reserves the right to reject any and all proposals received as a result of this request, or to renegotiate with any and all competing vendors. California State PTA also reserves the right to certify the top vendor by on-site visit of California State PTA representatives.

Disclosure of Proposal Contents

Proprietary and price information provided in your proposal will be held in confidence to the best of California State PTA's ability under the applicable laws of the State of California. Unsuccessful proposals will not be revealed or discussed with competitors.

Contract

It is California State PTA's intent to enter into one-time contract as a result of this RFP. It is proposed that, if a contract is entered into as a result of successful negotiations, the selected company will be required to sign a contract confirming specific terms, conditions, and fees, consistent with the proposal. The project will not commence until an agreement is signed which outlined the scope of all work, budget, terms and all necessary items.

PROPOSAL FORMAT

These instructions describe the required format for the RFP. RFPs submitted shall follow the format as described below, shall not exceed 10 pages and shall not use fonts smaller than 10 point. All pages shall be sequentially numbered. All materials submitted in response to this RFP shall become the property of California State PTA and will be returned only at California State PTA's option.

Consultants shall submit a copy of their proposal to the email address identified. An electronic copy of your proposal must be received at the California State PTA office by January 21, 2019 by 5:00 p.m. PST and should be delivered to Michelle Eklund at meklund@capta.org. Hard-copy proposals are welcome, but will not be considered an official submission.

Each copy shall contain the following documents:

- ✦ Cover Letter/Executive Summary
- ✦ Company Profile (See Attachment A)
- ✦ Professional Qualifications and Experience (See Attachment B)
- ✦ Relevant Examples (See Attachment C)
- ✦ Services and Cost Proposal for Phase 1 (See Attachment D)
- ✦ Timeline

Cover Letter/Executive Summary

The cover letter/executive summary shall be in the form of a standard business letter and shall be signed by an individual authorized to legally bind the company. The cover letter/executive summary shall provide the name and telephone number of a contact person with authority to answer questions regarding the proposal. The letter shall also include the name, telephone number and email address of a contact to be notified regarding contractual issues. The letter should clearly communicate the company's understanding of California State PTA's objectives and the scope of services required in this RFP.

Attachment A

COMPANY PROFILE

Item	Description
A-1	Name of Company
A-2	Address of Company (principal place of business)
A-3	Telephone number
A-4	Date established
A-5	Size of company (including the number of FTE employees)
A-6	The location of the primary office and ancillary offices that will provide services for California State PTA
A-7	Signature of an authorized officer or agent of the company submitting the proposal

Attachment B

PROFESSIONAL QUALIFICATIONS AND EXPERIENCE

Item	Description
B-1	Identify the individuals who will work on the project and the roles they will play
B-2	Describe your team's experience with nonprofit or for-profit organizations
B-3	Describe your organization's business development experience
B-4	Include three (3) specific references that we may contact

Attachment C

RELEVANT EXAMPLES

Item	Description
C-1	Provide at least three (3) examples of business plans your agency has developed which are most relevant to the proposed work for California State PTA
C-2	Include a brief strategic background summary of each example to include the company's role in the design and development of the project, not to exceed 400 words or one page

Attachment D

SERVICES AND COST PROPOSAL

Item	Description
C-1	Outline the company's approach to this project
C-2	Describe and outline the time frame for each phase as provided in the scope of Phase 1 of the project
C-4	<p>Provide a cost proposal to include all planning, development and any other elements necessary for the project completion. The costs quoted must be all-inclusive; anticipated additional costs should be itemized and called out in an exhibit or schedule</p> <p>Bidders are encouraged to suggest efficiencies and cost savings advantages to the California State PTA.</p> <p>Bidders are required to submit proposals for Phase 1 but may include initial thoughts for Phase 2 if desired.</p> <p>Proposals shall be valid for a minimum of ninety calendar days from submittal.</p>
C-5	Terms and conditions, and other supporting information shall be included in the cost proposal