

## ADDENDUM No. 1

### Request for Proposals (RFP) 14097 Bridging the Gap External Evaluator February 25, 2014

#### A. CLARIFICATIONS AND MODIFICATIONS TO THE RFP

1. This Addendum is posted on the West Virginia Higher Education Policy Commission (HEPC) purchasing webpage at the following URL. The name of the successful vendor(s) will also be posted on the HEPC purchasing webpage and will constitute official notification of the contract award.

<http://wvhepc.org/purchasing/>

2. Sealed Proposals will be received until 3:00 PM, Eastern Time, March 5, 2014 by:

Chief Procurement Officer  
RFP 14097  
West Virginia Higher Education Policy Commission  
1018 Kanawha Boulevard, East, Suite 700  
Charleston, WV 25301

Electronically transmitted (faxed or emailed) proposals will not be considered.

#### B. VENDOR QUESTIONS AND ANSWERS TO QUESTIONS

- Q1.** Considering the geographical constraint of personally reviewing the document, I request you to provide us the following details before we buy the document:

- 1) List of Items, Schedule of Requirements, Scope of Work, Terms of Reference, Bill of Materials required.
- 2) Soft Copy of the Tender Document through email.
- 3) Names of countries that will be eligible to participate in this tender.
- 4) Information about the Tendering Procedure and Guidelines
- 5) Estimated Budget for this Purchase
- 6) Any Extension of Bidding Deadline?
- 7) Any Addendum or Pre Bid meeting Minutes?

**Answer:** 1) This information is available in RFP 14097. There is no charge to review the RFP. The RFP is available at the following URL: <http://wvhepc.org/purchasing/>

2) See answer to Item 1 above.

3) There are no countries or vendors residing in these countries excluded from responding to this RFP; however, consideration will be given during the evaluation of proposals to those vendors who can promptly and economically provide the services required.

4) See answer to Item 1 above.

5) WVCTCS expects to expend approximately \$880,000 on Bridging the Gap project evaluation.

6) Currently, there are no extensions to the bidding deadline. If an extension is granted, the new bidding time and date will be posted by Addendum at the URL above in paragraph A.1.

7) There are no pre-bid meeting minutes. Addenda will be posted at the URL above in paragraph A.1.

- Q2.** Can the required forms (included with the RFP as Exhibits 1-4) be submitted as appendices? In other words, do the required forms count against the 12-page limit?

**Answer:** Exhibits A through D may be included as appendices.

- Q3.** Is there a page limit on the length of the appendices (e.g., resumes, additional information referenced in the 12-page response)?

**Answer:** Yes. The appendices to your proposal is limited to Exhibits A through D, the information you provide in your proposal in response to this RFP is limited to 12 pages.

- Q4.** Do we need to come there for meetings? Does each copy of the proposal also need an original authorizing signature or only the original version of the proposal? Also, should the signature be on the cover to the binder(s) or is it sufficient to have the signature on the first page including in the binder?

**Answer:** Yes it is expected that meetings will be attended in-person as needed. Only the original version of the proposal requires an original signature. Your signature may be on a cover letter included in the binder.

- Q5.** The RFP asks for 3 references for similar projects with descriptions, as well as 3 references for work done in the last 3 years. Can the second set of references be for projects that are still in progress, or do the projects need to have been completed within the last 3 years?

**Answer:** Yes. References can be for projects that are still in progress.

- Q6.** Will the resulting contract be awarded on a fixed-price basis?

**Answer:** Yes.

- Q7.** It is our understanding that all WV community and technical colleges comply to WV Higher Education Policy Commission's requirement to upload student enrollment, program course, and outcome data in a longitudinal data system. Can you confirm that this understanding is correct?

**Answer:** Yes, this is correct.

- Q8.** Are any firms who are involved in the TAACCCT national evaluation (conducted under contract with the U.S. Department of Labor) eligible to bid on the Bridging the Gap evaluation contract?

**Answer:** Yes.

- Q9.** Under Section 3.7(a) of the RFP, there is an expectation that the external evaluator will meet periodically with the Bridging the Gap consortium. Can you say whether these would mostly be in-person meetings? Also, can you estimate the frequency of these meetings over the course of the evaluation contract?

**Answer:** Section 3.9 identifies the expectations for the frequency of meetings. It is expected that at a minimum two visits per year will be in person.

- Q10.** Under Section 4.3(d) of the RFP, there is reference to "fiscal year" regarding the pricing proposal breakdown. Can you clarify that the fiscal year is October 1 to September 30 of each year?

**Answer:** Yes, it is October 1 to September 30.

- Q11.** What "contextualized gateway and bridge courses" are currently in place?

**Answer:** These courses will be developed as part of the grant project.

**Q12.** What percentage of students participate in the “online, blended, and remote technical program offerings and courses” (RFP p.5). Can qualified high school students attend these courses? And if so, are these students counted in the total number of students cited in the RFP?

**Answer:** Approximately 35 percent of students participate in technical program and courses offerings which are online, blended, or remote. Qualified high school students do not count in the total number of students cited in the RFP.

**Q13.** Would the suggested “project management practices” (p. 5) be part of the summative evaluation? What are “agile/lean” management practices?

**Answer:** Yes, project management practices will be part of the summative evaluation. Please see Solicitation for Grant Activities (SGA/DFA PY 12-10) for more detail. Agile/lean management practices are a strategy for continuous improvement based upon rapid and regular assessment of data in order to improve project deliverables.

**Q14.** Who develops and implements the system-wide employment scorecard?

**Answer:** That has not yet been determined.

**Q15.** Should the fee and expense proposal be submitted separately from the evaluation plan?

**Answer:** It may be submitted separately, but this is not a requirement.

**Q16.** To what does the 12-page limit apply: the evaluation plan only, or does it also include the qualifications and experience, and/or the fee and expense proposal?

**Answer:** See answers to Q2 and Q3.

**Q17.** The RFP describes the period of performance as 21 March 2014 through 30 September 2017; is this the period to which the estimated cost of \$880,000 applies? Elsewhere the RFP says there is a base year contract plus a maximum of five one-year renewals.

**Answer:** 21 March 2014 through 30 September 2017 is the period to which the estimated fee/cost is applied. The contract may be renewed beyond 30 September 2017 if the grant is extended/renewed for a maximum of five one-year renewals.

**Q18.** Who developed the evaluation plan submitted with the proposal?

**Answer:** The evaluation plan was developed under the direction of the President of Bridgemont Community & Technical College.

**Q19.** Was a 3rd party evaluator named in the original submission?

**Answer:** The West Virginia Higher Education Policy Commission.

**Q20.** May we have the word version of Exhibits A, B, and C in word format?

**Answer:** These documents are provided only in PDF format.

**Q21.** In the response from DOL, what modifications, if any, needed to made to the evaluation plan?

**Answer:** Two factors have been identified by the DOL that will need to be addressed in writing no later than May 15, 2014. Those factors are:

**Factor 1 Assessment: Outcomes/Impact Analysis**

The summary plan does not sufficiently explain the proposed participant outcomes/impact analysis, and some aspects of the plan may be inappropriate. The following components should be addressed in the detailed evaluation plan:

- The rationale for not using experimental design (small program enrollments) needs more explanation.
- More detail on the covariates and data sources that will be used to successfully implement propensity score matching (PSM).
- The proposed comparison group of first-time, full-time community college freshman served in 2012 does not seem comparable to TAA-eligible workers, veterans, apprentices, journeypersons, other non-traditional students, incumbent workers, and completers of CTE programs that may have more college and work experience. More detail is needed on why this is an appropriate pool of students to compare to the TAACCCT participants as well as the covariates to be used for drawing the match (e.g., socioeconomic/demographic data, work history, program of study). It would be helpful to understand whether this pool of students would come from the TAACCCT colleges or other colleges across the state and how this would be addressed in the analysis.
- The use of hierarchical linear modeling for the evaluation needs more detail. How the students would be nested (e.g., institutions, instructors) and the value of this method for measuring program impacts is unclear.

More detail is needed on the data sources that will be used for estimating educational and employment outcomes and impacts. It appears that administrative data from the state college system and quarterly UI wage record data are needed for this evaluation.

## **Factor 2 Assessment: Implementation Analysis**

The summary plan indicates that the implementation analysis will answer the research questions provided in the SGA, but more detail is needed on the data collection activities. The plan indicates that a “post-sprint” survey of the project manager will be conducted, but it is unclear what this data collection method is or the types of data that will be collected. No other qualitative data collection has been proposed, such as interviews with program staff or partners, to get the multiple perspectives typically needed to do a quality implementation analysis.

**Q22.** Did an external evaluation entity provide consultation (paid or not paid) on developing the scope of work?

**Answer:** No.

**Q23.** As clarification, will all the eligible energy, manufacturing, information technology, and construction trades career pathways across the college system or will only certain of these pathways be a focus for each individual institution?

**Answer:** Only certain pathways will be the focus for each individual institution.

**Q24.** Page 13 of the RFP, Proposal Content (Section 4.3.c) lists that bidders should submit:

(2) A list and contact information of three clients for whom similar work (e.g., experience with educational institutions and/or with projects of similar size and scope) was performed and a brief description of the services provided;

(3) A list and contact information of three references for work performed within the last three years; and

Could you please clarify how these two factors are different? Specifically, should contact information be provided for three or six references?

**Answer:** (2) refers to clients for whom similar work has been performed at any point in time, while (3) refers more generally to previous clients but specifies that they should be for work within the last three years. If the references in (2) and (3) are identical, than only three references would be provided. It is expected that a minimum of three and a maximum of six references would be provided.

**Q25.** Page 3 of the Evaluation Plan (Appendix 2 of the RFP) indicates that “the project manager will complete post-sprint surveys.” Could you explain what surveys are contemplated and whether the selected evaluation contractor is expected to have any role in preparing or administering them?

**Answer:** It is expected that surveys will be conducted to evaluate the efficacy of the management of the project. It is expected that the evaluation contractor will assist in preparing and administering those surveys.

**Q26.** The RFP indicates that the proposal shall not exceed 12 pages. Could you clarify what sections of the proposal are included in this page limit. For example, does the title page count? The fee and expense proposal? Can resumes be included as an attachment or would they count against the 12 pages as well? Can other attachments be submitted outside of the 12 pages (e.g., samples of prior work, or tables and charts)?

**Answer:** The title page and a one page cover letter do not count. All other pages count except Exhibits A through D – see answers to Q2 and Q3.

**Q27.** Could you clarify whether exhibits A (Agreement Addendum), C (Vendor Registration and Disclosure Statement), and D (W-9) need to be included with the proposal, or are they only to be supplied upon contract award? If some or all are included with the proposal, do they count against the 12-page limit?

**Answer:** Exhibits A through D should be included in the proposal. They may be added to the proposal as appendices and do not count in the 12 page limit.

**Q28.** Page 12 of the RFP indicates that “A summary of changes or refinements, if any, that the Bidder proposes to make to the Program Evaluation Plan attached as Exhibit B.” However, the Exhibit B included with the RFP is the Purchasing Affidavit, which bidders are to include with their proposals (section 4.5). Could you clarify if these are two separate exhibits? Also, does the Purchasing Affidavit count against the 12-page limit?

**Answer:** Correction. Where it reads “Exhibit B” it should read “Appendix 2”

**Q29.** What will the resultant agreement type be? Will it be a grant, cooperative agreement, or contract? Please confirm if fee is allowable.

**Answer:** The agreement will be a contract/purchase order. A fee tied to deliverables is allowable and is expected. No advance payments will be made prior to receipt of services.

**Q30.** Are there any standard terms and conditions that will be a part of any resulting award beyond those provided in Exhibit A?

**Answer:** There are standard purchase order terms and conditions that will be part of the contract/purchase order issued to the successful vendor. See Attachment 1 to this Addendum.

**Q31.** Per the RFP, we understand that the consortium will collect most of the data and share with evaluators. Are the project institutions responsible for collecting the employment and wage data (workforce data) or is it the evaluators’ responsibility to collect the data?

**Answer:** It is the responsibility of the evaluator to collect the employment and wage data.

- Q32.** We understand that the consortium institutions will administer CCSSE surveys with participants and comparisons. When and how often will the survey be administered?

**Answer:** The CCSSE survey is administered annually.

- Q33.** Will evaluators be able to add new items to the survey, or will the evaluators need to administer a separate survey?

**Answer:** The evaluators will not be able to add new items to that survey. They will need to administer separate surveys.

- Q34.** Can we expect to receive responses to questions asked by all other participating vendors? - If the evaluators will need to administer a separate survey using some items from a copyrighted instrument, how does the RFP 3.12 (see below) requirement apply to the survey specifically?

RFP 3.12: Work Product. Data collection methods (e.g., surveys, interview protocols) developed and quantitative and qualitative data collected for the purpose of conducting this evaluation shall be retained as the property of WVCTCS.

**Answer:** All vendor questions received by the time and date for receipt of requested are listed in this Addendum, along with answers to those questions. All work products created or modified using TAACCCT funds must be licensed under a Creative Commons CC BY license.

- Q35.** Can we use the same references for (1) a list of three clients for whom similar work was performed (RFP, 4.3 (c) (2)), and (2) a list of three references for work performed within the last three years (RFP, 4.3 (c) (3))?

**Answer:** Yes.

- Q36.** In the project's original evaluation plan to DOL (Appendix 2, p. 3), it says, the project manager will complete post-sprint surveys. What are the contents and constructs of the surveys? When and how often will the surveys be administered?

**Answer:** It is expected that the content and construct of the surveys, as well as the timeline for delivery, will be developed in partnership with the external evaluator.

- Q37.** Will the West Virginia Higher Education Policy Commission, Bridgemont Community and Technical College or the U.S. Department of Labor require evidence of Institutional Review Board approval for any component of the evaluation work?

**Answer:** No.

- Q38.** The RFP requires the external evaluator to perform an "external review of new education content and other grant work product before it is implemented" (RFP Pg. 7 of 18). In reviewing Appendix 1, specifically the discussion of Strategy 2 (page 16 of 45), Table 11: Bridging the Gap Credentials (page 19 of 45) and the Strategy 2 component of Table 12: Project Work Plan (page 30 of 45) it is not entirely clear which courses and credentials meet the definition of "new education content and other grant work product." Can the Commission provide a more detailed listing of courses and credentials and other grant work product that are subject to this review requirement, or otherwise provide guidance as to the expected quantity of review services needed?

**Answer:** It is expected that the external evaluator will conduct external review of four programs of study (construction management, occupational development, petroleum technology, and instrumentation technology); three bridge courses (energy, advanced manufacturing, and

information technology); and three capstone courses (energy, advanced manufacturing, and information technology). In addition, the external evaluator will conduct reviews of other grant products, including student services programs, efforts to track student success, and advising strategies including degree mapping.

- Q39.** Section 5.1 of the RFP (page 13 of 18) includes what appear to be two conflicting statements. “A Bidder is not required to be a registered vendor in order to submit a proposal.” And subsequently, “Vendors participating in this process should complete and file a Vendor Registration and Disclosure Statement (Exhibit C) and remit a registration fee to the address provided on the form.” Please clarify whether registration and payment of the fee is required or not required for vendors submitting proposals.

**Answer:** Vendors (Bidders) are encouraged to become a Registered Vendor prior to submitting a proposal. The successful Vendor (Bidder) must be a Registered Vendor to receive a contract/purchase order.

- Q40.** It was mentioned in the RFP a list of data elements collected by WVCTCS is located at the following website: <http://bit.ly/1eKulu8>. This link does not work. Is there another link to this site?

**Answer:** <http://www.wvhepc.com/resources/reports-and-publications/>. The links under File Specifications identify data elements collected by WVCTCS

- Q41.** How many educational content reviews do you anticipate having?

**Answer:** See answer to Q38

- Q42.** For the third component of the evaluation, you mention not only education content reviews but other reviews of grant products. What other types of grant products would you anticipate the evaluator reviewing?

**Answer:** Student services programs, data packages designed to track student success, and advising strategies that include degree mapping are grant products that we anticipate the evaluator would review.

**TERMS AND CONDITIONS**

1. ACCEPTANCE: Seller shall be bound by this Order and its terms and conditions upon receipt of this Order. This Order expressly limits acceptance to the terms and conditions stated herein. Additional or different terms proposed by the Seller are objected to and are hereby rejected, unless otherwise provided for in writing by the Buyer and approved by the Attorney General.
2. APPLICABLE LAW: The laws of the State of West Virginia and the Procedural Rules of the Governing Board having jurisdiction shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
3. ASSIGNMENT: Neither this Order nor any monies due, or to become due hereunder, may be assigned by the Seller without the Buyer=s consent.
4. BUYER: For the purposes of these Terms and Conditions, the ΔBuyer@ means the institution purchasing goods and services for which a Purchase Order has been lawfully issued to the Seller.
5. CANCELLATION: The Buyer may cancel any Purchase Order/Contract upon 30 days written notice to the Seller.
6. COMPLIANCE: Seller shall comply with all federal, state and local laws, regulations and ordinances including, but not limited to, the prevailing wage rates of the W. Va. Division of Labor, if applicable.
7. DELIVERY: For exceptions to the delivery date as specified in the Order, the Seller shall give prior notification and obtain the approval of the Buyer. Time is of the essence of this Order and it is subject to termination by the Buyer for failure to deliver on time.
8. DISPUTES: Disputes arising out of the agreement shall be submitted to the West Virginia Court of Claims.
9. HOLD HARMLESS: The Buyer will not agree to hold the Seller or any other party harmless because such agreement is not consistent with state law.
10. MODIFICATIONS: This writing is the parties' final expression of intent. No modification of this Order shall be binding unless agreed to in writing by the Buyer.
11. NON-FUNDING: All services performed or goods delivered under this Purchase Order/Contract are to be continued for the term of the Purchase Order/Contract, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
12. ORDER NUMBERS: Contract Order numbers or Purchase Order numbers shall be clearly shown on all acknowledgments, shipping labels, packing slips, invoices and correspondence.
13. PAYMENTS AND INTEREST ON LATE PAYMENTS: Payments may only be made after the delivery of goods or services. Interest may be paid on late payments in accordance with the West Virginia Code.
14. RENEWAL: The Contract may be renewed only upon mutual written agreement of the parties.
15. REJECTION: All goods or materials purchased herein are subject to approval of the Buyer. Any rejection of goods or materials resulting in nonconformity to the terms, conditions or specifications of this Order, whether held by the Buyer or returned to the Seller, will be at the Seller=s risk and expense.
16. SELLER: For the purposes of these Terms and Conditions, the ΔSeller@ means the vendor whose quotation, bid, proposal or expression of interest has been accepted and has received a lawfully issued Purchase Order from the Buyer.
17. SHIPPING, PACKING, BILLING & PRICING: Unless otherwise stated, all goods are to be shipped prepaid, FOB destination. No charges will be allowed for special handling, packing, wrapping, bags, containers, etc., unless otherwise specified. All goods or services shall be shipped on or before the date specified in this Order. Prices are those that are stated in this Order. No price increase will be accepted without written authority from the Buyer.
18. TAXES: The State of West Virginia (the Buyer) is exempt from Federal and State taxes and will not pay or reimburse such taxes.
19. TERMINATION: In the event of a breach by the Seller of any of the provisions of this contract, the Buyer reserves the right to cancel and terminate this contract forthwith upon giving written notice to the Seller. The Seller shall be liable for damages suffered by the Buyer resulting from the Seller=s breach of contract.
20. WARRANTY: The Seller expressly warrants that the goods and/or services covered by this Order will: (a) conform to the specifications, drawings, samples or other description furnished or specified by the Buyer; (b) be merchantable and fit for the purpose intended; (c) be free and clear of all liens, claims and encumbrances of any kind; and/or (d) be free from defect in material and workmanship.