Request for Proposals No. 12434.01
Modification 01
Questions and Answers

Education Development Center, Inc.  
(Hereafter referred to as “EDC”)
Request for Proposals for the Procurement of  
External Evaluation Services

Release Date of Modification 01
August 30, 2021
Original Date of Issuance:
August 10, 2021
STEM-OPS RFP for Evaluation Services
Questions and Responses

Questions and Answers:

1. *Do STEM-OPS stakeholders refer to the five core partners or should we apply a broader definition?*

   **Answer:** A broader definition which includes people outside of the five core partner organizations who are connected the goals of STEM-OPS.

2. *What can you share about the work of the previous evaluator?*

   **Answer:** Several questions were received regarding the previous evaluator- this response consolidates those responses:
   
   - We cannot provide the name of the previous evaluation firm. The firm is no longer in operation, but we have negotiated an agreement with the former principal to meet with and provide support to the selected evaluator.
   - We are currently working with the previous evaluator to receive all data that were collected. The data, instruments, plans, and reports from the previous evaluation firm will be made available to the selected evaluator.
   - Evaluation activities in year-one focused on evaluating STEM-OPS efforts to establish a shared vision for STEM-OPS and a cross-organizational infrastructure and communication plan. Few evaluation activities were conducted in year two.
   - Also, the National Science Foundation INCLUDES coordination Hub has recently developed a survey for all NSF INCLUDES project which is aligned to the elements of collaborative infrastructure. The results of the first administration of this survey (from April 2021) will be shared with the selected evaluator, and it is expected that this survey will be administered, by the NSF INCLUDES Hub, each year (which should reduce some burden from the selected STEM-OPS evaluator).

3. *Is one of the Technical Evaluation Criteria named "Technical and managerial qualifications and experience" or is that two separate criteria, "Technical and managerial" and "qualifications and experience"? The table was split across pages 7 and 8 of the RFP.*

   **Answer:** Please read this as “technical and managerial qualifications and experience”

4. *Can the new evaluator include a consultant or subcontractor in their budget?*

   **Answer:** Yes
5. Can you provide additional clarification around which activities the evaluator will conduct vs. which activities are to be evaluated in Sections 4.1 and 4.2? Are the activities described in 4.2 program activities which the evaluator will need to evaluate, or are they activities you would like to include in the evaluators scope of work?

Answer: Activities listed in section 4.2 are activities that are being conducted by the five core partners of STEM-OPS and expected to be evaluated. The evaluator will NOT be involved in carrying out these activities.

6. With five core partners and an external evaluator, could EDC please explain how they envision these groups working together as a team (e.g., decision-making and roles/responsibilities within the project) and how the partners would work with the external evaluation team?

Answer: We have cross-organizational structures in place, including an executive committee (responsible for overall strategic vision and sustainability and responding to NSF and other funder requests); a steering committee (which oversees various components of the work) and ad hoc subcommittees (targeted to specific tasks/goals). The selected evaluator will join the monthly meetings of the executive committee as part of monitoring progress towards our strategic goals, and likely occasionally attend meetings of the other groups as well as part of evaluating our development of an effective collaborative infrastructure.

7. To what extent will the five core partners engage in the evaluation activities? Is there an anticipated amount of time for their participation in the evaluation activities that has been shared with the five core partners?

Answer: Members of the five core partners will all be involved in the evaluation as users of the findings as well as potential participants the evaluators will involve in their work. In the past, members have completed surveys and participated in interviews in response to requests from the evaluation, as well as completed work-style inventories.

8. When will EDC know whether continued funds are available? Is there a sustainability plan in place for the programming post-2024?

Answer: Funds for project years 4 and 5 will be released as part of approval of our annual reports to NSF (approximately in June-August each year). A comprehensive sustainability plan is not in place at this point but is one of the areas of focus for our executive committee.

9. Is there a specific demographic targeted within the population of those who are/have been incarcerated?
**10. What prison education programs does STEM-OPS currently work with?**

**Answer:** Groups and individuals participate in STEM-OPS in different ways so this is a difficult question to answer succinctly. People from over 60 different organizations have participated in our activities. We have a variety of higher education in prison programs represented in our network. As a collaborative network, STEM-OPS has not, to date, worked directly to design prison education programs; rather STEM-OPS activities bring together members across the network to collaboratively develop solutions to systemic problems limiting STEM access to education and careers for people currently or formerly incarcerated.

**11. Does EDC already have an IRB package in place or is this something the evaluation partner will be responsible for developing and securing?**

**Answer:** The answer to this question depends on the specifics of the data collection strategy of the selected evaluator, in particular if data is planned to be collected from people who are currently in incarcerated. EDC will work closely with the selected evaluator to take the appropriate actions.

**12. One of the minimum requirements listed is “Ability to travel to event locations in the United States, as needed, and in accordance with safety precautions.” What safety precautions does EDC currently have in place?**

**Answer:** This was an acknowledgement of the unpredictable nature of travel due to the ongoing effects of COVID 19. We will work with the selected evaluator to confirm when in-person travel is safe and appropriate. Currently, our meetings and events have been online, although we intend to resume some in-person meetings and events as soon as it is responsible to do so.

**13. What events should potential Offerors anticipate travel for in the budget proposal?**

**Answer:** Proposals should include funds for these travel requirements:
- In years 3, 4, and 5, plan for in-person representation at the STEM-OPS annual convening (locations TBD).
- In years 3, 4, and 5, plan for travel to Washington DC for a 1-2 day, in-person NSF INCLUDES convening.
- In year 4, plan for travel to Washington DC for a 2-day meeting with an NSF INCLUDES advisory panel as part of a “reverse site visit.”
- You may budget for additional travel dependent on your proposed data collection plan.

14. **Are any additional appendices allowed beyond CVs and attachments listed in the RFP?**

   **Answer:** No, although additional information may be requested as part of an interview process with short-listed offerors.

15. **The hyperlink tie to “collaborative infrastructure” on pg. 4 of the RFP led to a page saying access was denied. Can you reshare the link or materials the URL was associated with?**


   Also, additional resources on the NSF INCLUDES model of “collaborative infrastructure” can be found on the website of the national network: [https://www.includesnetwork.org/home](https://www.includesnetwork.org/home) (access may require free registration).

16. **What is your intended use for the findings of this evaluation?**

   **Answer:** Beyond what is included in the RFP, we expect to work with the selected evaluator on a continuous basis to articulate how evaluation findings will be used and applied in our work.

17. **Are you able to provide more details about the STEM-OPS convening held in Feb 2021? What were some key takeaways and opportunities for growth?**

   **Answer:** We have generated reflections and some feedback data from attendees from the first convening. A more comprehensive and in-depth account can be provided to the selected evaluator. The convening confirmed that there is great interest in the focus of our work, a need for research on the strategies we are developing, and that there are many potential partners who are willing to advance the work. We determined that we need more time for planning the next convening, and, if the next convening is also online, we learned some strategies for supporting a better experience for attendees.

18. **How often do you hope to conduct the STEM-OPS convenings?**

   **Answer:** We anticipate that these will be annual- approximately in spring each year.

19. **How will the evaluation team be expected to engage in the convenings?**
**Answer:** The evaluation team is expected to be present at the convening. The exact role and engagement of the evaluation team at the convening will depend on the final evaluation plan (for example, data may be collected at the convening, as determined by the final evaluation plan).

20. **Other than convenings, has STEM-OPS tried other activities to expand their community of stakeholders?**

**Answer:** Yes, we have presented a small number of webinars, a community-based systems-mapping process that engaged over 50 community stakeholders, conducted a series of affinity groups in years 1 and 2, and will soon launch working groups.

21. **Among the requested activities is “Launch and maintenance of a STEM-OPS project website. The website will serve as a dissemination hub for STEM-OPS products and as a platform for STEM-OPS convenings, webinars, podcasts, reports, and foster communications and interaction among Working Group members.” Does EDC have a platform already that the evaluation partner is expected to maintain?**

**Answer:** The website is an activity of the STEM-OPS core partners that will be evaluated—it is not expected that the selected evaluator will be involved in maintaining the website.

22. **Is experience working with people currently or formerly impacted by incarceration a requirement or a preference?**

**Answer:** A preference.

23. **The Technical Proposal requirements state that the proposal should include “A description of similar work performed by the Offeror. The similar work should demonstrate previous experience in event/hospitality planning for non-profit organizations.” Is the part about event/hospitality planning correct?**

**Answer:** This was included in error! It was a remnant from the template that we used for the RFP. Please disregard and apologies for any confusion.

24. **Budget format clarification – The budget template includes rows for costs based on direct labor, other direct costs, indirect costs, and identify fee/profit. As a for-profit organization, this is a non-traditional way for us to budget for projects. Would it be sufficient to provide our fully-loaded hourly rates for our staff consultants?**

**Answer:** It is required that the budget be presented in the provided format.

25. **What has already been developed in the evaluation? Is there a theory of change or other similar documentation?**
**Answer:** We have developed a strategy map, which needs further elaboration as well as clearly identified indicators and measures; we have also created a community-based systems-map that describes the system of factors that inhibit or support access to STEM education and careers for directly impacted people. Both maps were created through processes that included input from all core partners and other stakeholders. The maps, as well as other relevant documents that could inform creating indicators will be shared with the selected evaluator.

26. **Likewise, what should we know about where you are in your workplan at this stage related to the activities in 4.2?**

**Answer:** Each of those activities are roughly in the beginning stages. We have some estimates that we can share: We anticipate the launch of the working groups in September-November 2021 and the launch of the public website in Sept 2021. Planning for shared measures and the annual convening are in the first steps. Dissemination of research is not anticipated until 2022.

27. **How do you hope the research component of your work (Goal #2) intersects with the evaluation?**

**Answer:** We hope this will intersect in two ways: 1) evaluation of the use and dissemination of research led by STEM-OPS partner organizations, and 2) the evaluation results are also expected to be shared as research on the effectiveness of STEM-OPS approaches as part of STEM-OPS contribution to expanding the knowledge base related to our work.

28. **For the assessment of the collaborative infrastructure, are you using any models of collaboration that we would use to center measurement? For example, a collective impact model, etc.**

**Answer:** The evaluation should prioritize the NSF INCLUDES model of collaborative infrastructure, although our work is also strongly informed by the model of collective impact from FSG.

29. **Do you have a definition of equity that you are working from?**

**Answer:** We have developed different statements of our shared goals that guide our work, including the vision statement included in the RFP- however, we do not have a definition of “equity,” specifically.

30. **Re: Item 4.3 What is anticipated with "rigorous study of influence or impact on related outcomes by initiative activities and products, resources and research"? Specifically,**
"rigorous" can have particular and different meanings for different folks. What are hopes underlying this item?

**Answer:** We use the word “rigorous” to indicate our hope that the evaluation results will provide the strongest evidence possible, within the budget and other limitations for study, on the influence of STEM-OPS activities on our outcomes.

31. **We see that proposal price remains valid for a period of time (8.2) but it is also anticipated that final plans will be collaboratively developed. Can you share how you plan to approach this?**

**Answer:** We expect a period of good faith negotiations as we work with the selected provider to finalize the work plan and deliverables from their proposal to fit within the budget provided.

32. **We see definitions of various disadvantaged businesses; how does this come up in proposal review?**

**Answer:** This will not be part of the proposal evaluation.

33. **EDC is a highly respected firm known for conducting large-scale evaluations. I am curious why EDC is outsourcing this project? Is there a quality or skillset that EDC looking for in an evaluator or firm that might not be available within EDC?**

**Answer:** We believe our goals are best supported by an external evaluator.

34. **Are STEM-OPS bi-monthly meetings virtual? If in-person, where are they held?**

**Answer:** The meetings are virtual and were held remotely prior to COVID, since representatives are spread around the country. It is anticipated that the meetings will continue to be held virtually throughout the duration of the project.

35. **Once STEM-OPS metrics are identified, will each partner be responsible for data collection within its own organization, or is the evaluator expected to collect all data?**

**Answer:** Likely a mix. For example, partner organizations collect some relevant data already and working groups are also expected to be involved in collecting data to measure progress in their areas of focus.

36. **From how many physical sites will data be collected?**

**Answer:** The number of physical sites for data collection is not predetermined. The evaluator may use a mix of in-person and remote data collection strategies.
37. NSF allows up to 10% indirect for firms without a negotiated federal indirect rate. Does that rule apply for this project? That is, if we do not have a federally negotiated indirect rate and indirect costs are 10% or less, must all indirect expenses be provided as line items and a 2-years’ of financial statements included in proposal materials?

**Answer:** Yes, you may apply a 10% indirect cost without any additional information needed.

38. Could you clarify what is meant by “A subcontract will be issued for all the deliverables?” Does that mean each deliverable is paid in a separate contract, or that the vendor is expected to have a subcontractor work on each deliverable?

**Answer:** This refers to the subcontract that will be created between EDC and the selected evaluator. In that subcontract, payments will be tied to the completion of specific deliverables.

39. What is the anticipated level of involvement between the evaluator and STEM OPS working groups? How involved will working groups be in the evaluation?

**Answer:** Please include a proposed plan for evaluation of the working groups in your submission. We would expect that the selected evaluator will provide findings on the process applied by the working groups to develop their products, and, when products are completed, to assess the dissemination of these products and their utility in other settings.

40. Is the design of the website part of the scope of work? If there is any clarification that EDC can provide about this activity, it would be helpful.

**Answer:** No. Website design and maintenance is an activity that is in the scope of work for EDC and the other core partners of STEM-OPS. The evaluation plan will include attention to how the website contributes to STEM-OPS’s overall goals.

41. Is EDC open to approaches outside of formative evaluation (other methods of data collection) to support the work?

**Answer:** Yes! Please propose whatever approach you think works best given your understanding of the goals and activities of STEM-OPS.

42. Can the new evaluator include a consultant or subcontractor in their budget?
Answer: Yes.