

TAB A:
Executive Summary

Executive Summary

RTI International is pleased to submit this proposal to provide a program review of Howard County Public School System's (HCPSS) special education programs. We have built our response to this request from our extensive experience in evaluating programs at the school, district, state, and national levels. Our work in evaluating the effectiveness of programs in achieving their objectives and documenting best practices positions us to approach evaluation from the point of view that our evaluations are objective and independent.

HCPSS is interested in three overarching areas under which more specific questions are proposed. These areas are as follows:

- What is the **current state of special education** in HCPSS for ALL students served by HCPSS, including those target populations specifically called out in the Request for Proposal—that is, students served in early childhood special education programs, students served in nonpublic programs, students served in regional and specialized programs, and Twice-Exceptional learners? Sub-questions in this area are understanding of referral, pre-referral, and identification processes; understanding of effective and inclusive educational environments; and instructional delivery across the continuum from birth to 21 years of age.
- **What organizational, staffing, and resource allocation structures** exist to address the needs of the whole child, including academic and nonacademic needs for students within district programs, as well as students served in regional and specialized programs? Sub-questions under this broad area include understanding the **organizational structure** for central office support of special education; process by which staffing, and resource allocation decisions are made in programs within the district, and in regional and specialized programs.
- **How does HCPSS compare to like districts within and outside of the state?** How are other comparable districts creating evidence-based staffing models, program models, **and service delivery options for meeting the needs of all learners** for an efficient and effective service delivery continuum? Examples of areas of study in this third question are comparative analysis of service delivery models, special education staffing models that include caseload ratio analysis, instructional models in least restrictive environment, and related student outcomes.

In our experience, the most useful and actionable evaluations come from our belief that the program review belongs to the district and we, as evaluators, should focus on key areas of concern for the district. An effective evaluation should inform the district's next steps and position the district to create short-, medium-, and long-term goals aligned with the district's priorities. This inquiry-based approach to evaluation allows us to ask questions and engage in inquiry that will surface root causes of challenging and long-standing barriers that are not easily known without careful analysis and meaning making with our district partner. With this approach, we consider our evaluation to be formative and summative. The formative aspect of the evaluation serves to support HCPSS in making actionable decisions that are time-sensitive, while summative results set the stage for creating long-term goals and actions for systemic change.

Special education reviews with RTI follow a four-step process: creating a data collection plan, executing on the data plan, analyzing, and interpreting collected data, and preparing a comprehensive report. For this special education review, the evaluation design will focus on these evaluation questions (EQs) and sub-questions:

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EQ 1: What is the **current state of special education** in HCPSS for all students served by HCPSS, including early childhood special education, students served in nonpublic programs, students served in regional and specialized programs, and Twice-Exceptional learners?

[Redacted]

EQ 2: What **organizational, staffing, and resource allocation structures** exist to address the needs of the whole child, including academic and nonacademic needs for students within district programs, as well as students served in **regional and specialized programs**?

[Redacted]

RTI specializes in comprehensive support. RTI can also support the implementation of recommendations through targeted technical assistance, strategic planning, and professional learning. Our approach, evaluation design, and additional offerings are further defined in Tab E.

TAB B:
Title Page and Table of Contents



Howard County Public School System

Technical Proposal

Response to Request for Proposal (RFP)

September 10, 2024

Submitted By:

RTI International
3040 East Cornwallis Road,
PO Box 12194
Research Triangle Park, NC
27709-2194 USA

RTI Proposal No. 0282401.672
Solicitation Number: 026-25-B6

Submitted To

Howard County Public School System
Attn: Office of Purchasing
10910 Clarksville Pike
Ellicott City, Maryland
21042-6198

Phone: 410-313-6544

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. Under the Maryland Public Information Act, RTI is not providing a redacted copy of its proposal protecting certain information, as none is considered proprietary and business confidential. 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.



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TAB C: Transmittal Letter



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

September 16, 2024

Afua Tisdale
Office of Purchasing
Howard County Public School System
10910 Clarksville Pike
Ellicott City, MD 21042

Subject: Revised Transmittal Letter, *RFP 026.25.B6 Special Education Review*

Dear Ms. Tisdale:

Research Triangle Institute, under the trade name RTI International, a 501(c)(3) nonprofit organization [UEI: JJHCMK4NT5N3], is pleased to submit this proposal in support of Howard County Public School System. RTI proposes to perform the work with a proposed period of performance of eight (8) months beginning on or about November 1, 2024 through June 30, 2025, with the option for an additional one-year period. In support of this offer, we have enclosed a statement of work.

RTI shall complete all services set forth in the proposal within the proposed time limits to the satisfaction of HCPSS.

Our extensive experience in evaluating the effectiveness of programs at the school, district, state and national levels positions us to conduct a special education program review that examines the legal compliance, instructional quality, and effectiveness of HCPSS's Special Education Program. RTI's goals in conducting reviews is to answer key questions through inquiry that will surface root causes to barriers and challenges of effective programming. Our role as evaluators is to partner with HCPSS to identify strengths that can be replicated and scaled, to contextualize our findings, and to reveal opportunities for growth that result in systemic changes that when implemented, will undergird student success.

RTI accepts HCPSS standard terms and conditions and provided in the Appendix E sample contract.

This offer shall remain valid for 120 days from opening.

RTI appreciates the opportunity to submit this proposal for your evaluation, and we look forward to partnering with HCPSS on this project. Should you have any questions regarding our proposal, please feel free to contact me at evvandevender@rti.org or 919-316-3431.

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to read 'Eve Van Devender', written over a light blue horizontal line.

Eve Van Devender
Contracting Officer

[0282401.672]

**TAB D:
Solicitation Document
and Addenda**



Office of Purchasing
10910 Clarksville Pike, Ellicott City, Maryland 21042-6198
(410) 313-5644, fax (410) 313-5644

**Request For Proposal – Special Education Review
Bid # 026.25.B6**

Solicitation Number: Bid # 026.25.B6
Proposal Issued Date: August 15, 2024
Pre-Proposal Conference: N/A
Question Deadline: August 27, 2024
Proposal Due Date and Time: September 10, 2024

Public Opening: **Not Public**
Anticipated Contract Start: **November 1, 2024**

NOTE: MINORITY & SMALL BUSINESS ENTERPRISES AND VETERAN-OWNED BUSINESSES ARE ENCOURAGED TO RESPOND TO THIS RFP.

This proposal must be signed by an offeror authorized to make a binding commitment for the firm submitting the proposal. By submitting a proposal in response to this RFP, the offeror selected for award agrees that it shall comply with all federal, State, and local laws, and HCPSS policies and regulations applicable to its activities under the resulting contract. Any offeror selected for award, including businesses outside of the State, must comply with registration/verification requirements of the Maryland Department of Assessments and Taxation. www.dat.maryland.gov

Your signature on this page provides HCPSS your acknowledgment and acceptance of the terms and conditions contained in the Request for Proposals and will abide by all of its terms and conditions. Unauthorized exceptions, amendments, or deviations in the response may result in disqualification of the submittal.

Offeror Name: Research Triangle Institute

Address: PO Box 12194, 3040 East Cornwallis Rd, Research Triangle Park, NC 27709

Phone: 919-316-3431 Fax: N/A e-mail: evevandevender@rti.org

Federal ID or Social Security Number: 56-0686338 MDOT MBE Certification #: N/A

MD Dept. of Assess. & Taxation #: F00920629 eMaryland Marketplace #: SUP121712

DGS Small Business Certification # (if any): N/A

Signature of Offeror: 

Printed Name, Title and Date: Eve Van Devender, Contracting Officer, September 6, 2024

TAB E:
**Approach to Special
Education Review and
Work Plan**

Approach to Special Education Review and Work Plan

RTI International's approach to conducting special education program reviews is to answer questions of legal compliance, instructional quality, and effectiveness of a special education program. Although many evaluators examine the three elements of compliance, quality, and effectiveness, our approach maintains our independence and objectivity in our role as evaluators while partnering with the district to contextualize our findings and support communication to stakeholders and the broader community. Most importantly, the review is expected to culminate in findings that will lead to systemic changes that undergird student success. These reviews support districts in identifying strengths that can be replicated and scaled, revealing opportunities for growth, prioritizing resource allocations, and illustrating recommendations for achieving beneficial student outcomes.

RTI Differentiators

- | [Redacted]
- | [Redacted]
- | [Redacted]
- | [Redacted]
- | [Redacted]
- | [Redacted]
- | [Redacted]

RTI partners with school districts to assess systems, structures, and processes and evaluate effectiveness related to student outcomes and operational efficiency. We build a comprehensive understanding of how well programs are working. Our work is grounded in the following assumptions:

- | [Redacted]
- | [Redacted]



Exhibit 1 provides a visual model of our overall approach to evaluation.

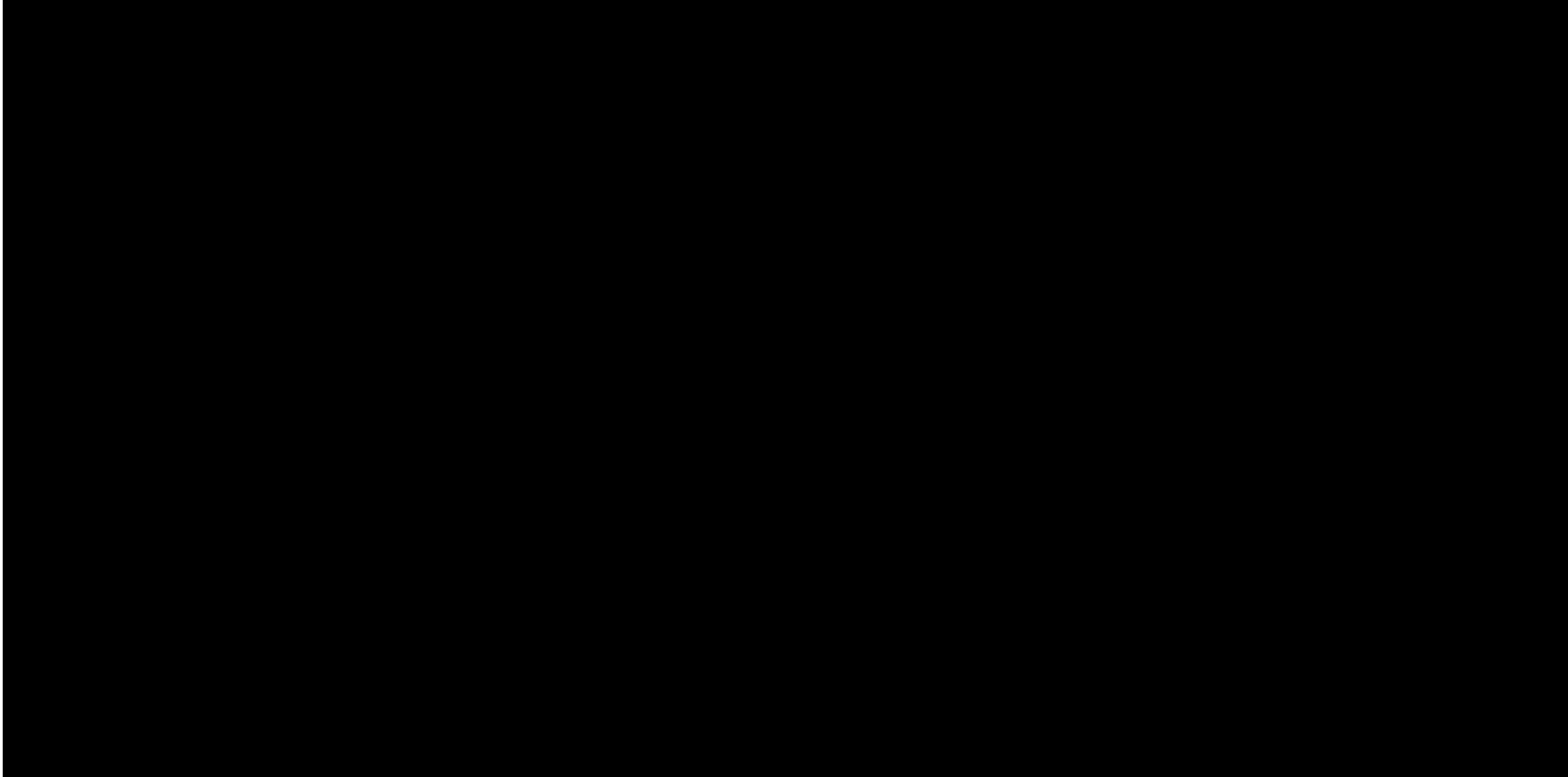
Ability to Organize and Facilitate Broad Stakeholder Engagement

Stakeholder perspective on their experiences with the special education programs in HCPSS is critical to the evaluation process. We have employed a myriad of ways to involve the community, including one-on-one interviews, small kitchen-table conversations, focus groups, and larger town halls, that we can leverage to collect stakeholder input for the HCPSS Special Education review. Additionally, we gather feedback through targeted questionnaires to gather and analyze data from a variety of stakeholders, such as faculty, community, and/or students. A few key tenets drive our approach to helping districts like HCPSS fully engage their community and ensuring all voices are heard.

¹ Riccomini, P. J., Morano, S., & Hughes, C. A. (2017). Big ideas in special education: Specially designed instruction, high-leverage practices, explicit instruction, and intensive instruction. *TEACHING Exceptional Children*, 50(1), 20–27. <https://doi.org/10.1177/0040059917724412>; Aceves, T. C., & Kennedy, M. J. (Eds.). (2024). *High-leverage practices for students with disabilities* (2nd ed.). Council for Exceptional Children and CEEDAR Center.

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[Redacted]



[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Evaluation Design

HCPSS is interested in a systems analysis with three key areas that will pinpoint where to focus the system's efforts in support of teaching and learning for students with disabilities. These areas lend themselves to analysis by answering these evaluation questions (EQs) and sub-questions:

² Venkateswaran, N., Feldman, J., Hawkins, S., Lewis, M. A., Armstrong-Brown, J., Comfort, M., Lowe, A., and Pineda, D. (2023). *Bringing an Equity-Centered Framework to Research: Transforming the Researcher, Research Content, and Practice of Research*. RTI Press Publication No. OP-0085-2301. Research Triangle Park, NC: RTI Press. <https://doi.org/10.3768/rtipress.2023.op.0085.2301>

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- **EQ 1:** What is the **current state of special education** in HCPSS for all students served by HCPSS, including early childhood special education, students served in nonpublic programs, students served in regional and specialized programs, and Twice-Exceptional learners?

█ [REDACTED]

█ [REDACTED]

█ [REDACTED]

█ [REDACTED]

- **EQ 2:** What **organizational, staffing, and resource allocation structures** exist to address the needs of the whole child, including academic and nonacademic needs for students within district programs, as well as students served in **regional and specialized programs**?

█ [REDACTED]

█ [REDACTED]

█ [REDACTED]

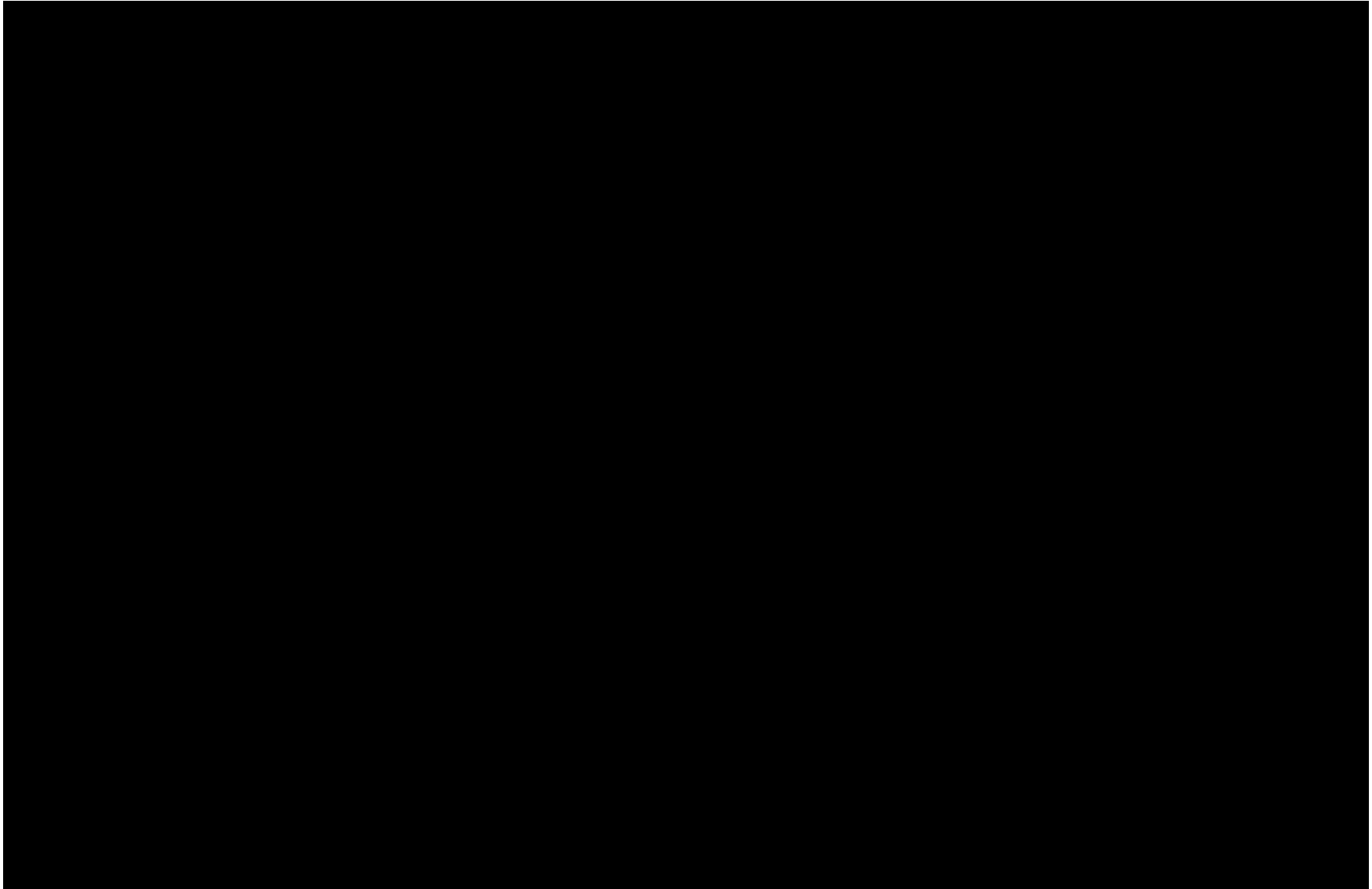
█ [REDACTED]

Exhibit 2 indicates how each evaluation question is aligned to the needs of HCPSS as indicated in the 3.1 Contractor Requirements (page 23 of the solicitation), along with the purpose and data collection activities for each sub-question.

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A. Sub-Questions	B. Alignment with RFP Area of Focus	C. Purpose	D. Data Collection
EQ 1: What is the current state of special education in HCPSS for all students served by HCPSS, including early childhood special education, students served in nonpublic programs, students served in regional and specialized programs, and Twice-Exceptional learners?			
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Confidential and Proprietary Information



E-7

Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal.

Confidential and Proprietary Information

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A. Sub-Questions	B. Alignment with RFP Area of Focus	C. Purpose	D. Data Collection
EQ 2 What organizational, staffing, and resource allocation structures exist to address the needs of the whole child, including academic and nonacademic needs for students within district programs, as well as students served in regional and specialized programs?			
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Evaluation Procedures and Work Plan

In planning for the program review, evaluators will clarify with HCPSS the objectives and activities using logic models and theories of change co-created with HCPSS district partners. In collaboration with the district, we align evaluation questions with HCPSS's short-, medium- and long-term goals for the program review. We will tailor the study design to the social and cultural context of HCPSS Special Education programs. For example, our review of publicly available records indicated that HCPSS saw a significant boost in special education staffing, including a rise in conditionally certified teachers. The district also promoted 50 employees to teaching positions, primarily from paraeducator roles. Open contracts increased by 105.5% to attract qualified candidates for critical areas like special education. The increase in hires for noncertificated roles also reflects broader staffing trends. We understand that the school district has a strategic priority to increase resources and ensure the success of all students, with a particular focus on those with IEPs, students receiving English for speakers of other languages services, and students living in poverty.³ Information like the above gleaned from record review supports the team in understanding the district's priorities for staffing and the need for a timely comparative analysis *prior* to completion of the full summative report to inform decision-making.

Data Collection and Analysis

The data collected will include district documentation pertaining to the current state of special education and may include, but is not limited to, the review of student outcome data, internal district process documents, and student record reviews; on-site observations; focus groups; budget reviews; and strategic, personnel, and staffing plans and surveys. Analyses of focus groups and interviews will be thematic, analysis of document reviews and observations will be protocol-based, and analysis of surveys will be both qualitative and quantitative.

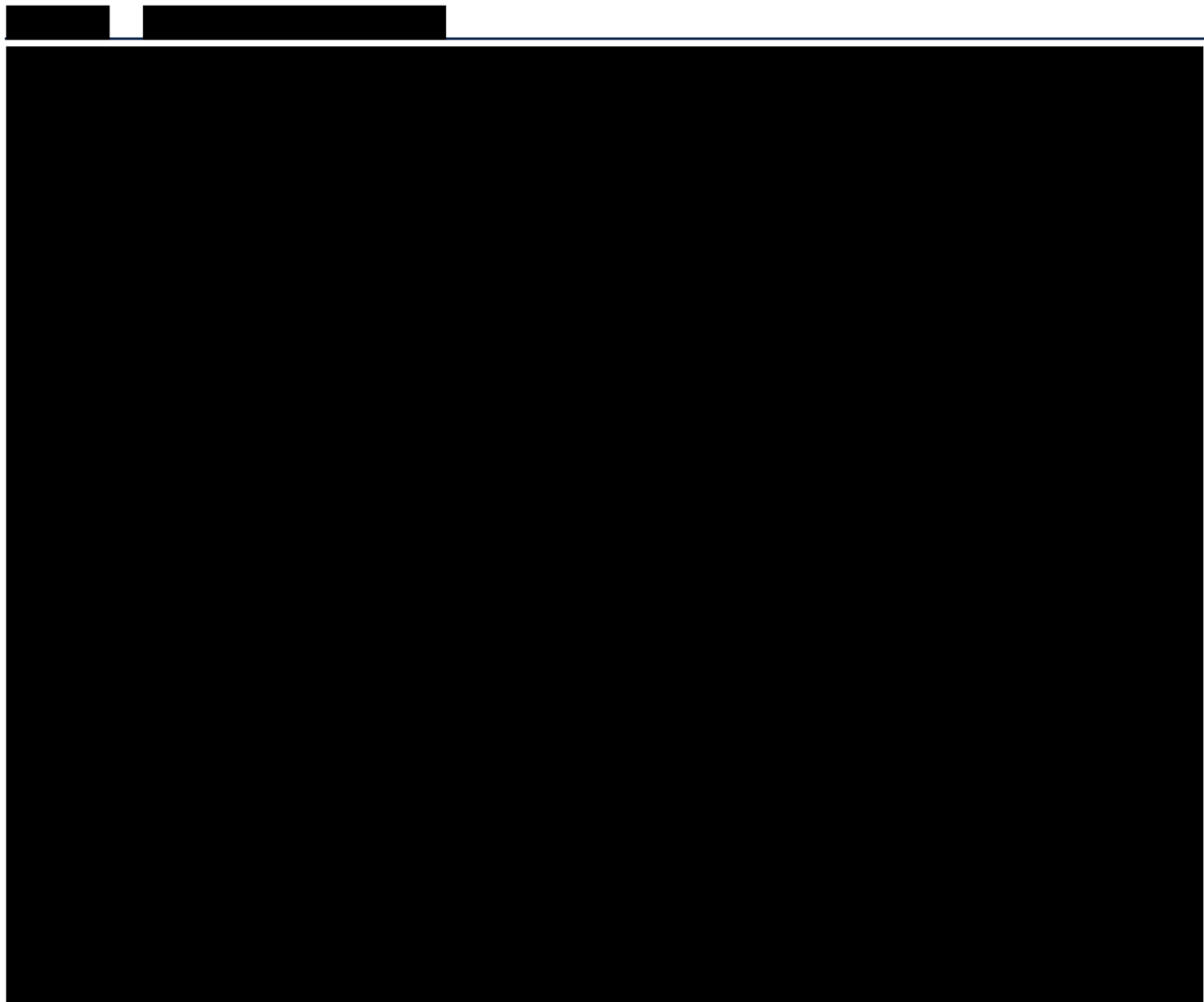
Record reviews. The documents we expect to review will include those determined in partnership with HCPSS. Suggested documents include:

- Strategic plan
- State performance profile (trend analysis)
- Staffing and personnel trend reports
- Special education staffing plans
- Public-facing and internal documents describing the continuum of services
- De-identified student records
- Procedures and guidance documents
- Written articulation of special education service delivery models
- Professional development calendars
- Organizational charts

On-site observations. Observations may include those of IEP meetings, observation of service delivery models across types from most restrictive to least restrictive instructional settings, and observations of culture and climate using validated assessment instruments. Due to IEP meeting confidentiality, HCPSS and the evaluation team may determine to use other data collection processes besides observations to assist with the evaluation.

Focus group for key stakeholders. Focus groups will be used to address sub-questions for the current state of special education in HCPSS. **Exhibit 3** shows sample protocol questions for selected groups. The intended study is not limited to the samples below.

³ Howard County Public School System. (n.d.) *Maryland's blueprint for the future* [fact sheet]. <https://www.hcpss.org/f/blueprint/md-blueprint-future-overview.pdf>



Comparative Analysis. One of the evaluation tasks requires completion of a comparative analysis of staffing models with recommendations to be shared with the district prior to the completion of all evaluation tasks and submission of a final report. Our approach will provide the data needed to inform potential staffing decisions. The summative aspect of our evaluation is its utility as a baseline for consideration of future capacity building efforts in areas aligned with the district's priorities.



Interpretation and Reporting

Findings will be reported by evaluation question and sub-question and will include the following:

- Evaluations will provide real-time feedback on progress and outcomes to inform program improvement at agreed-upon regular intervals. We consider this evaluation formative and summative. The formative aspect is intended to support the district in making decisions based in part on emergent findings, especially when there are opportunities to trial small-scale innovations to scale and spread. The summative aspect of the

evaluation will culminate in a final report and will be informed by any changes noted as a result of the district's actions on formative evaluation aspects.

- The findings are expected to enhance relevance and applicability of evaluation findings for HCPSS programs and facilitate peer-to-peer learning and sharing of promising and best practices

Reporting Recommendations

Recommendations will be a key part of the evaluation. Specifically, the Request for Proposal (RFP) requests the following recommendation areas:

- Recommendations for staffing and program other models are expected at a date discussed upon initial planning meeting with HCPSS staff and within 2 months of the planning meeting. Final recommendations due upon submission of final report.
- Suggestions for process improvements based on current early intervention/special education procedures to determine efficiency and effectiveness of the referral, evaluation, and identification processes.
- Recommendations for evidenced-based models, approaches, and other best practices to ensure an efficient and effective delivery of a continuum of special education services in public school environments.
- Recommendations of specific strategies to increase effectiveness and ensure high-quality services and support.
- Offer options for supplemental services that can support other district needs, such as strategic planning, leadership development, and professional development for staff

If relevant to findings resultant from our special education program review, our recommendations will include consideration of entry points for capacity building around sustainable high-quality special education service delivery aligned with district priorities. These may include review of pre-referral processes and multi-tiered systems of supports (MTSS) and completion of capacity assessments at sites, departments, and/or teams that are identified in collaboration with district partners to determine readiness for implementation of new processes and practices. If appropriate and relevant to findings, coaching of staff in support of systems change at both the leadership and direct service levels may be included.

Tasks and Timeline

Exhibit 4 shows the tasks and the activities distributed by month. The tasks are divided into three categories:

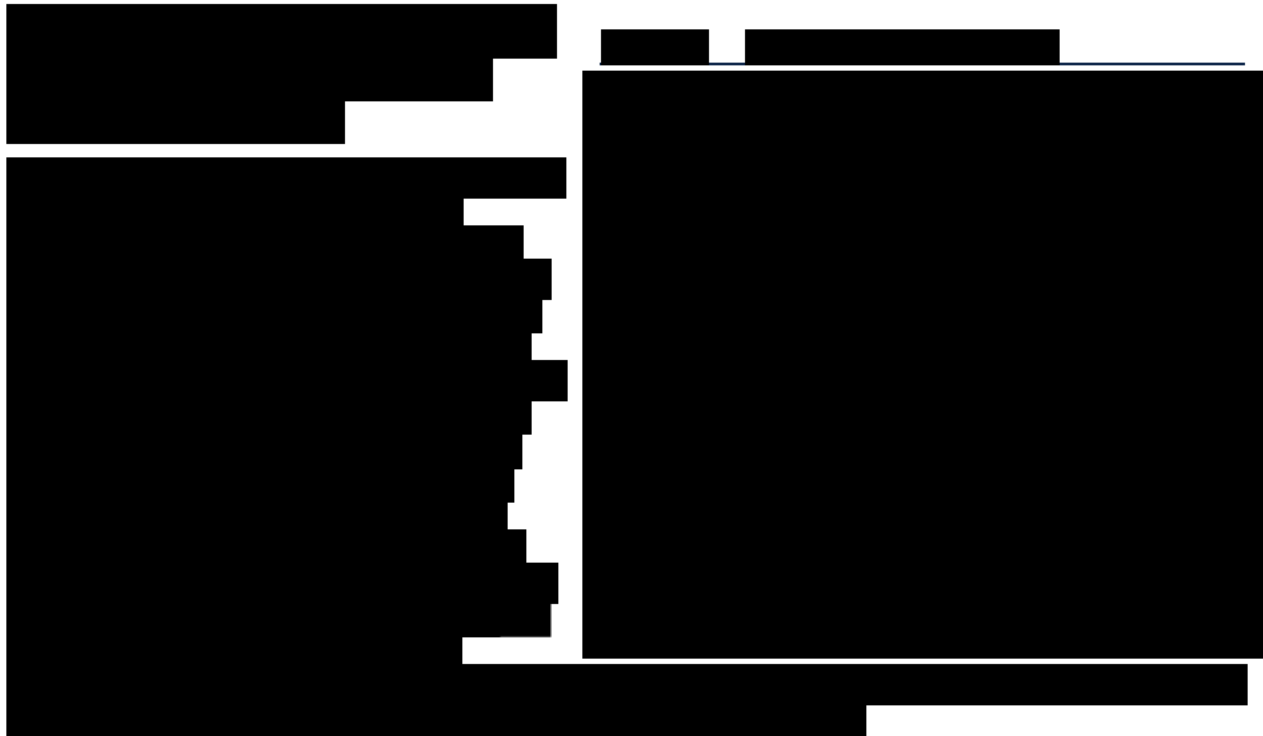
- Task 1: The current state of special education in HCPSS
- Task 2: Comparative analyses of evidence-based approaches
- Task 3: Management and reporting

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Exhibit 4. Tasks and Activities by Month

	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Task 1: Current State of Special Education in HCPSS								
Complete Institutional Review Board approval	•							
Determine documents for review*	•							
Develop document analysis protocol*	•							
Determine stakeholders to interview/focus group*	•							
Develop focus group protocols*	•	•						
Conduct focus group: central office staff			•					
Conduct focus group: school staff			•	•				
Analyze and memo focus groups				•	•			
Develop and program survey*		•	•					
Survey students, parents, community			•	•				
Analyze and memo surveys				•	•			
Review analyses and memos*				•	•			
Draft recommendations*				•	•			
Task 2: Comparative Analyses of Evidence-based Approaches								
Determine approach to comparative analyses*	•	•						
Conduct comparative analyses		•	•					
Memo comparative analysis recommendations		•	•					
Review comparative analyses recommendations*		•	•					
Revise recommendations*			•	•				
Task 3: Management and Reporting								
Determine detailed timeline for all tasks*	•							
Share and provide progress feedback*	•	•	•	•	•	•	•	•
Draft report					•	•	•	
Review and revise report*						•	•	
Finalize report							•	•
Present report to stakeholders								•

*All activities with an asterisk are in partnership with HCPSS



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Technical Assistance for MTSS Implementation to Support Special Education Pre-Referral and Beyond

[Redacted text block]

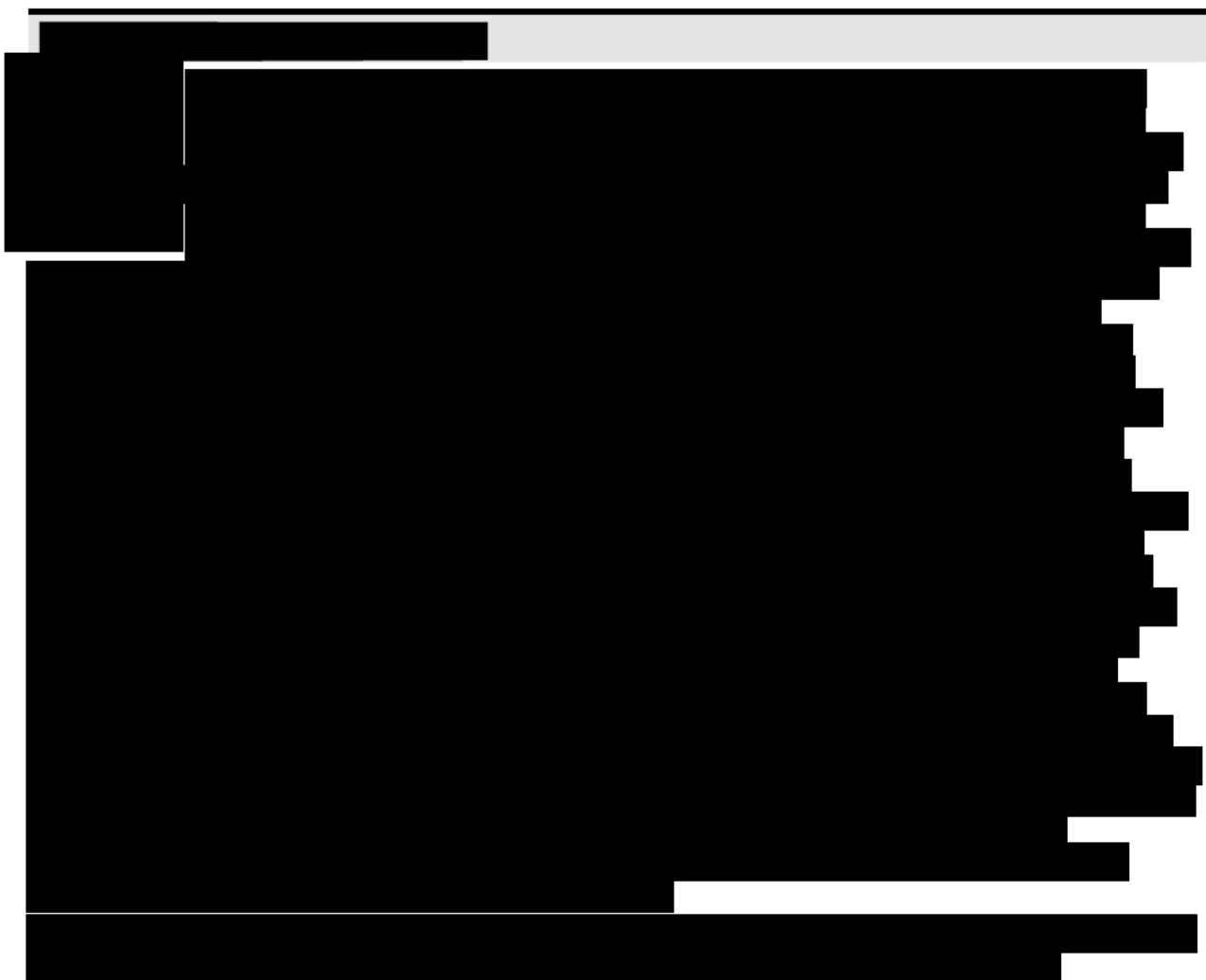


**TAB F:
Experience and
Qualifications of Proposed
Staff**

Experience and Qualifications of Proposed Staff

The RTI team brings experience and dedication to this work. The project team stands ready to provide immediate support to HCPSS and needs minimal time to begin delivering services using a proven set of tools and processes.

RTI proposes a project team with extensive experience in supporting education entities with special education consulting and technical assistance to conduct reviews, gathering district data, providing meaningful insights, gathering stakeholder input, and reporting on recommended strategies needed to implement a plan for change. 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. Our unique experience as practitioners and technical experts will benefit the strategic plan development of the special education review for HCPSS because we understand the daily challenges special education educators and district leaders face. Staff was selected for their diversity in perspectives and experiences, including neurodivergence. The following biographies showcase the diverse experience and qualifications of RTI team members and are reflective of the staff members who will work on this project. Qualifications specific to this work can be found in *Exhibit 7*.



[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted content]

[Redacted content]

[Redacted content]

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Resumes

- [Redacted] Project Director
- [Redacted] Associate Project Director
- [Redacted] Content Specialist and Field Expert
- [Redacted] Content Specialist and Field Expert
- [Redacted] Content Specialist and Field Expert

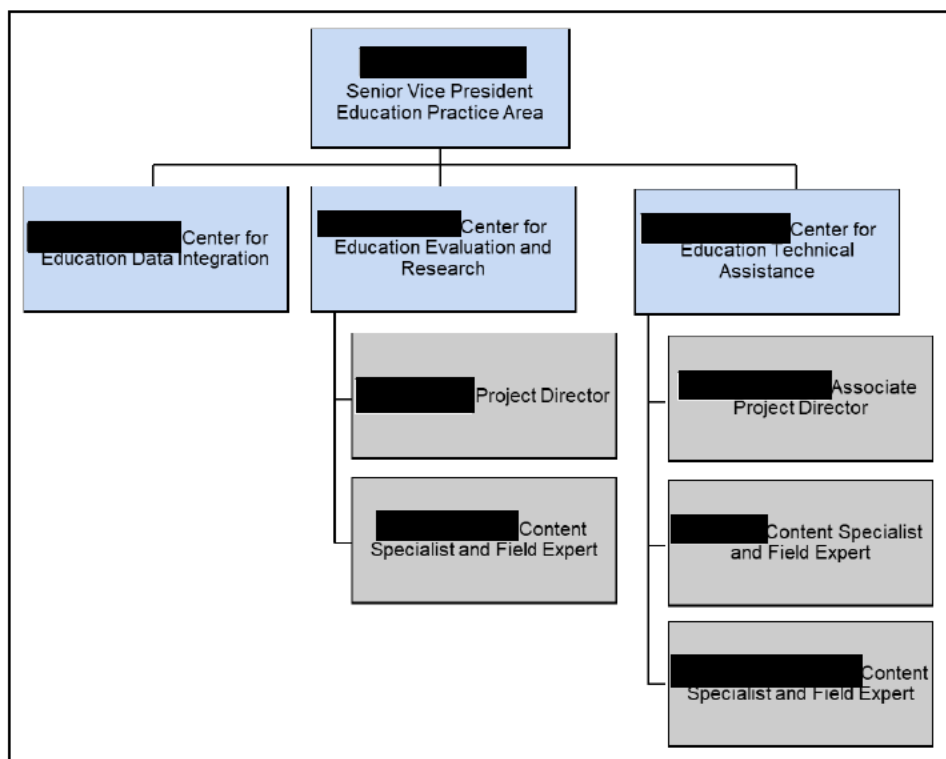
**TAB G:
Organizational
Qualifications and
Capabilities**

Organizational Qualifications and Capabilities

RTI has been in business for more than 65 years. In the past 5 years alone, we have supported 12 projects focused on special education initiatives.

Founded in 1958, RTI is an independent, nonprofit research institute dedicated to improving the human condition. We deliver reliable data through analysis, innovative methods, novel technologies, and sustainable programs that help our clients ground practice in evidence. Our staff of nearly 6,000 works in more than 75 countries and tackles hundreds of projects each year. One of RTI's focus areas is education. Led by [REDACTED], the Education Practice Area, of which this team resides (*Exhibit 8*), has extensive expertise in providing technical assistance, evaluations, and program reviews in school districts across the nation.

Exhibit 8. Education Practice Area and Project Team Organizational Chart



We believe that all students deserve access to a quality education that empowers them to thrive. This core belief aligns to the current HCPSS mission:

HCPSS ensures academic success and social-emotional well-being for each student in an inclusive and nurturing environment that closes opportunity gaps.

RTI partners with states, universities, districts, and schools to continuously improve educational quality and to promote thriving learning environments that facilitate success for all students. Our team believes in applying an equity-focused lens to education systems, policies, and practices to address systems-level change. Research shows the critical link between school and district

leaders and student success, and to ensure equity, it is critical that every student have access to high-quality curriculum and evidence-based instruction.⁴

We activate our commitment to ensuring that every child succeeds—regardless of zip code, socioeconomic status, or historical marginalization—by collaborating with clients, exploring data, understanding assets and challenges, engaging in active listening, using intentional language, providing and seeking feedback, and facilitating conversations with multiple points of view. We openly discuss root causes that create barriers to access and identify and prioritize the voices and lived experiences of the people and communities most affected by these inequities. As a result, we co-create inclusive, just, and restorative programs, policies, and power structures that allow school and district leaders to better understand, respond to, and center their individual community's successes and needs.

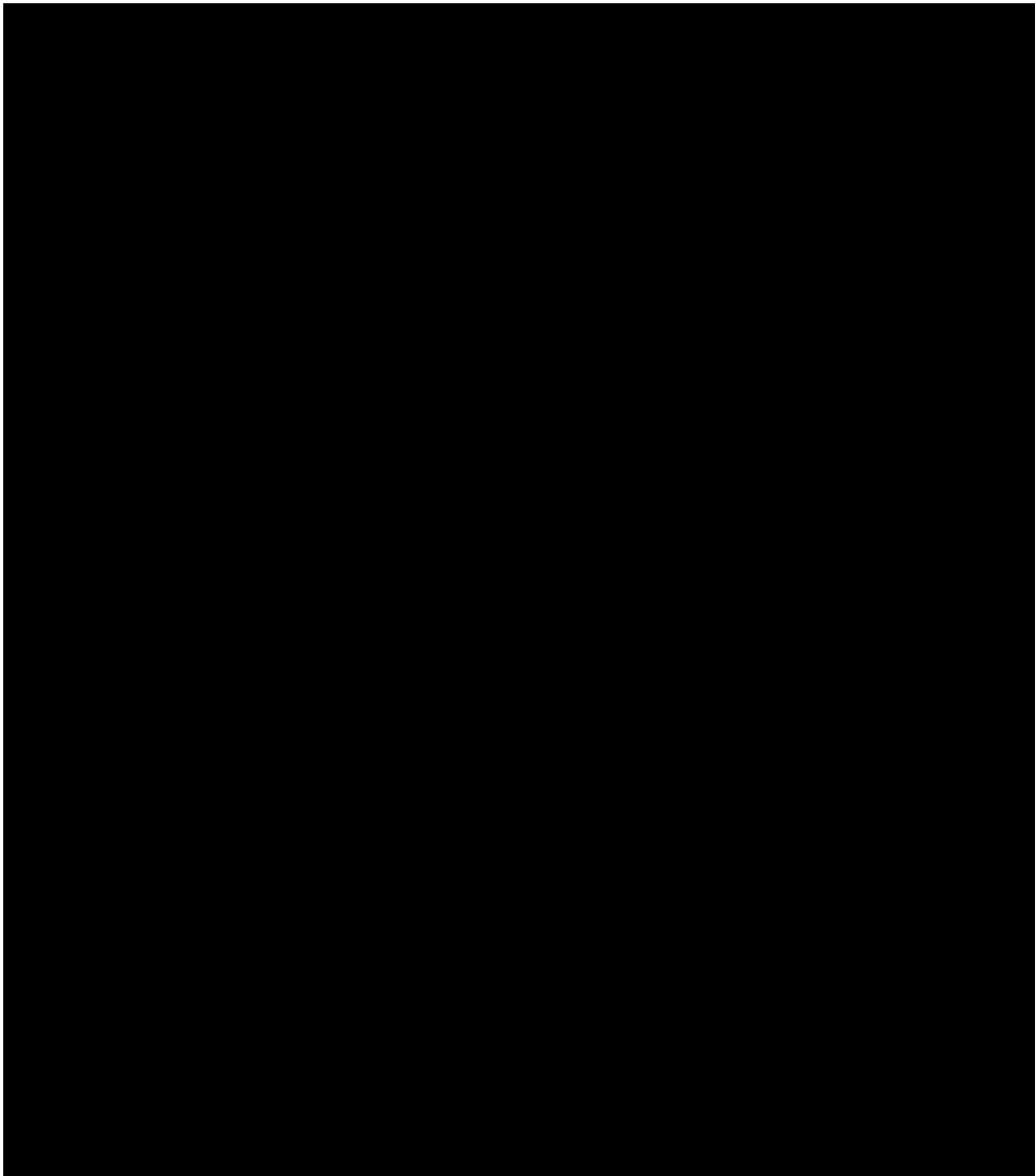
Selected Prior Similar Projects

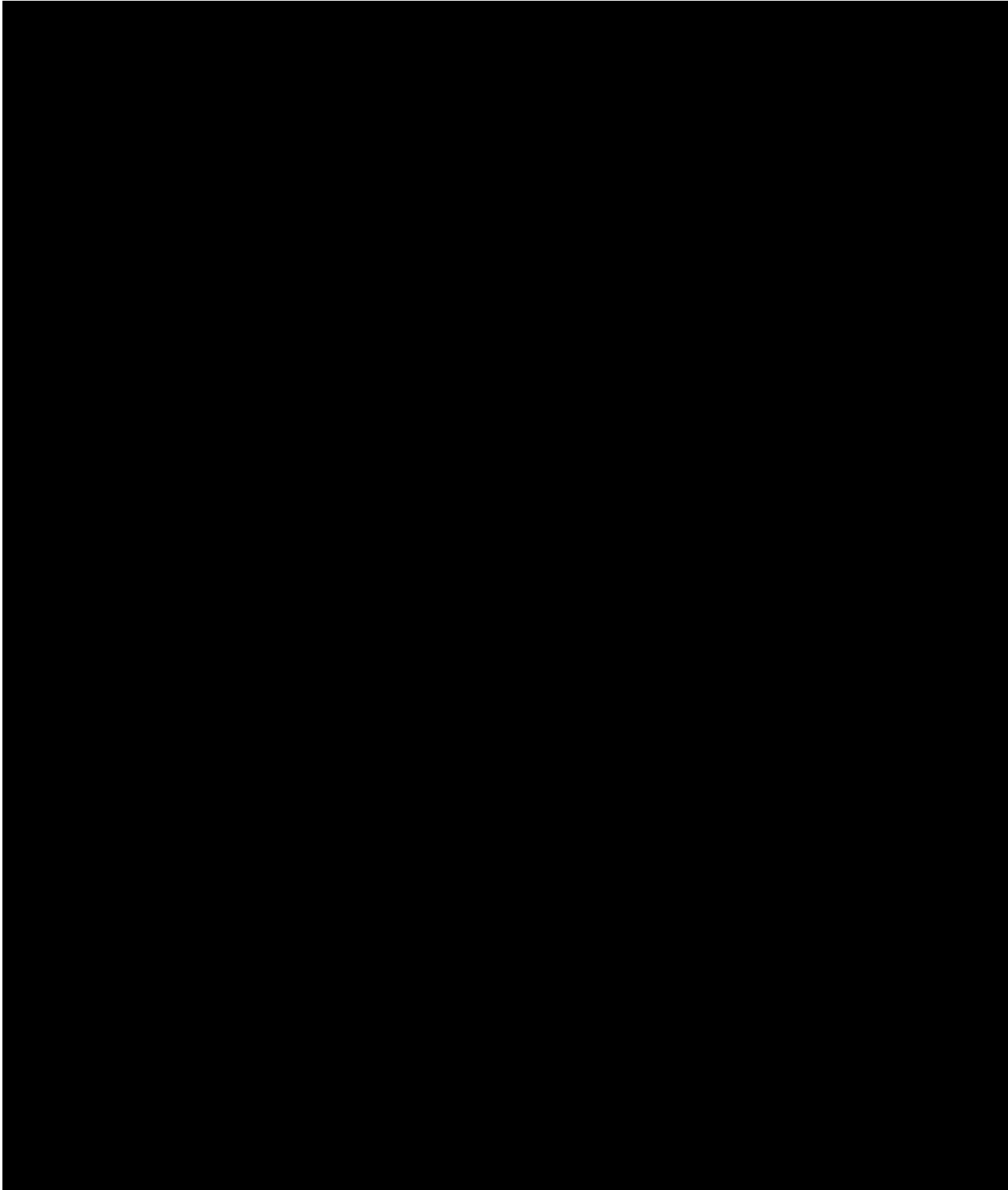
The following are highlights from RTI's portfolio of projects. These overviews highlight recent projects where RTI provided services similar to the needs of HCPSS—special education reviews, equity consulting, stakeholder engagement, data analysis, and strategic consulting/planning.

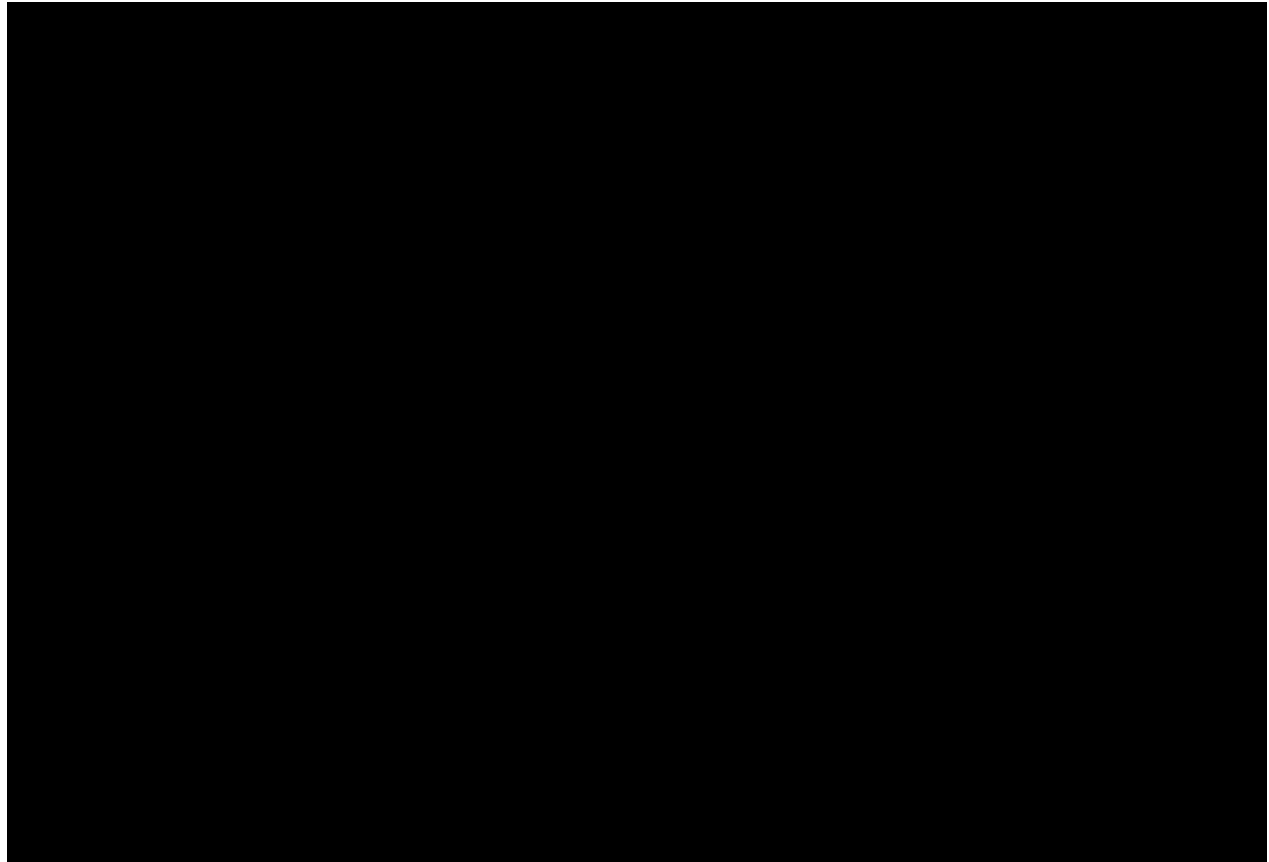
RTI has experience in evaluation, study design and implementation, and high-stakes research projects in the area of special education. **Exhibit 9** summarizes selected relevant project experience of the proposed team.

⁴ TNTP. (2018). *The Opportunity Myth: What students can show us about how school is letting them down—and how to fix it.* <https://tntp.org/publication/the-opportunity-myth/>

Exhibit 9. Relevant Project Experience







Quality Management and Project Management

RTI's team is poised to provide the highest level of service. RTI sets high expectations and standards for quality, which are embedded into our work processes. A significant tool for achieving quality standards begins at the start of each project when the project team develops a quality management plan. Our team uses the project documents (e.g., RFP, final contracts, initial meeting notes, exemplars) to create an internal plan positioning us to deliver a quality experience and product to our clients.

In this plan, we address the following items:

- **Define quality for the client and the team.** RTI will create a unique set of quality objectives specific to the HCPSS project and will use information gained at the initial project meeting to further clarify quality from HCPSS's point of view.
- **Identify project risks and mitigation/elimination strategies.** RTI recognizes the potential for some form of risk in every project. We assess project risks comprehensively in areas such as budget, capacity, and time. Once identified, we work closely with the client and as a team to mitigate or eliminate those risks with strategies related to engagement or collaboration and other strategies, such as regularly communicating, clarifying areas of uncertainty, and providing resources for review in advance of meetings or engagements. This is a part of our quality management that we constantly revisit—both formally and informally—throughout the project cycle.
- **Establish quality roles and responsibilities.** Within the RTI team, we will clarify the roles of each of our team members and field experts. We will collaborate to define the quality requirements for each team member.

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- **Monitor and control quality.** In partnership with HCPSS, RTI will detail the project deliverables and establish processes to review those deliverables during ongoing check-in meetings with HCPSS for the quality characteristics established. In addition, RTI has strong financial accountability and monitoring mechanisms to reduce billing errors. Our financial system provides accounting reports; this, along with standard operating procedures, allows for close monitoring to address any billing errors.
- **Plan for continuous improvement.** RTI will regularly review the project plan and evaluate it for changes in client context and necessary revisions. RTI will also evaluate each meeting with HCPSS to continually improve and refine deliverables to reflect the expectations of HCPSS.

In addition to the quality management plan, RTI's institutionalized project management processes are built upon a commitment to continuous improvement, open communication, and collaboration. This ensures that our team remains responsive to high-priority and evolving implementation needs. The RTI team will engage in discussions about our shared goals and progress, both explicitly and implicitly, in all interactions with HCPSS leadership, partners, and collaborators. These will include the following strategies:

- **Evaluate check-in meetings.** We believe that the time we spend with our clients is vital and that it should be planned, reflect the objectives of the project plan, embed client requirements and continually changing context, and reflect RTI's expectations of quality products and services. At the end of each check-in meeting or engagement, the RTI meeting facilitator will assess the success in achieving the objectives of the meeting and offer opportunities to improve for the next engagement. This feedback will be used to inform all subsequent activities, building an ever-increasing level of quality in project execution and products.
- **Conduct a client listening survey.** RTI also sends a survey to the client during the project to assess quality. This tool enables HCPSS to provide an additional level of feedback to our team and the greater RTI organization.

G.1 Company Profile

Answers to Question Set 6

6.0.1: Resumes for Key Personnel included for [REDACTED]

6.0.2: RTI has no legal action (pending or resolved) in the State of Maryland during the previous 3 years.

6.0.3: RTI is not listed as excluded in SAM. Please also see Appendix I.

Answers to Question Set 7

7.0.1: Eve Van Devender

7.0.2: PO Box 12194, 3040 East Cornwallis Rd, Research Triangle Park, NC 27709

7.0.3: evevandevender@rti.org

7.0.4: Contracting Officer

7.0.5: 919-316-3431

7.0.6: N/A

7.0.7: N/A

**TAB H:
Equal Employment
Opportunity Practices**

Equal Employment Opportunity Practices

This solicitation does not contain MBE requirements.

TAB I:
Conflict of Interest

Conflict of Interest

RTI does not have any existing or potential conflict of interest relative to the performance under the Contract to disclose. RTI agrees that, if selected, it will be independent and not be unduly influenced by any group or individuals, public or private, to include the HCPSS, Maryland State Department of Education, Maryland State Government, or any of its respective employees, members, or representatives.

APPENDIX C – INFORMATION AND COST PROPOSAL

A. GENERAL

1. Offeror's Name: Research Triangle Institute
Address: PO Box 12194
3040 East Cornwallis Rd
Research Triangle Park, NC 27709
Telephone: 919-316-3431
2. Person Responsible for completing this form:
Name: Eve Van Devender
Title: Contracting Officer

B. CONTRACT FOR INSIDE CONTRACT ADMINISTRATION

In the event your Organization receives a contract as a result of this Invitation for Bid, please designate an inside person whom we may contact during the period of the contract for prompt contract administration:

Name <u>Eve Van Devender</u>	Title <u>Contracting Officer</u>
Address <u>See above</u>	Phone <u>919-316-3431</u>
	Fax <u>N/A</u>
Email <u>evevandevender@rti.org</u>	Pager/cellular <u>N/A</u>

C. RECEIPT OF ADDENDA

Submitting provider must acknowledge receipt of all addenda issued below:

Addendum: <u>1</u>	Dated: <u>August 23, 2024</u>	Received: <input checked="" type="checkbox"/>
Addendum: <u>2</u>	Dated: <u>August 29, 2024</u>	Received: <input checked="" type="checkbox"/>
Addendum: <u>3</u>	Dated: <u>September 4, 2024</u>	Received: <input checked="" type="checkbox"/>
Addendum: _____	Dated: _____	Received: <input type="checkbox"/>
Addendum: _____	Dated: _____	Received: <input type="checkbox"/>

D. FORM FOR COST PROPOSAL

Total Cost for review \$ 138,856

Please include a complete itemized budget for justification of total cost.

Note: rates offered shall be inclusive of all overhead, profit, travel, accommodation, administrative fees, and direct and indirect costs and shall represent onsite staff work within Howard County, MD.

Appendix C.1 – COST PROPOSAL SIGNATURE SHEET

THE HOWARD COUNTY PUBLIC SCHOOL SYSTEM

A. Bidder's Certification

1. I/we hereby propose to furnish and deliver supplies, equipment, or services, in accordance with specifications and stipulations contained herein, and at the prices quoted. I/we certify that this bid is made without any previous understanding, agreement, or connection with any person, firm, or corporation making a bid for the same supplies, materials, or equipment and is in all respects fair and without collusion or fraud.

2. I/we certify that this bid is made without having contacted any employee within The Howard County Public School System unless such contacts were previously authorized by the Purchasing Officer.

3. I/we certify that this bid is genuine and not collusive or sham; that said bidder has not colluded, conspired, connived and agreed, directly or indirectly, with any bidder or person to put in a sham bid or to refrain from bidding and is not in any manner, directly or indirectly, sought by agreement of collusion or communication or conference, with any person to fix the bid prices of the affidavit or any other bidder, or to fix any overhead, profit or cost element of said bid price, or that of any bidder, or to secure any advantage against the Board of Education of Howard County or any other person interested in the proposed contract; and that all statements in said proposal or bid are true.

4. I/we affirm that this firm will not knowingly employ an individual to work at a school if the individual is a Registered Sexual Offender, pursuant to section 11-722 (C) of the Criminal Procedure Article of the Annotate Code of Maryland. A firm or person who violates this section is guilty of a misdemeanor and on conviction is subject to imprisonment not exceeding 5 years or a fine not exceeding \$5,000 or both.

5. I hereby certify that I am authorized to sign for the bidder.

B. Vendor/Contractor Disqualification - Bribery

1. A person convicted for bribery, attempted bribery, or conspiracy to bribe shall be disqualified from entering into a contract with any county or other subdivision of the state. Every business entity upon submitting a bid or otherwise applying for a contract shall submit an affidavit stating whether it, its officers, directors, or partners, or its employees have been convicted of bribery, attempted bribery, or conspiracy to bribe under the laws of any state or federal government.

Submitted by:

Research Triangle Institute

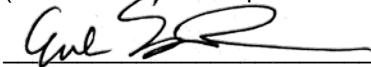
(company name)

Eve Van Devender

(person authorized to sign bids)

Contracting Officer

(title of authorized representative)



(signature of authorized representative)

September 6, 2024

(date)

RTI Budget Narrative

Overview

The purpose of this budget narrative is to address the solicitation requirements by explaining the basis for the estimate for each category of cost in sufficient detail to facilitate Howard County Public School System’s (HCPSS) determination of cost reasonableness.

RTI’s budget for the *Special Education Review* is presented in Time and Materials format. The total RTI budget is \$138,856. This 8-month budget reflects an independent, comprehensive review of the early intervention/special education processes, programs, and services in HCPSS for November 1, 2024 – June 30, 2025. RTI will examine legal compliance, instructional quality, and effectiveness of HCPSS’ Special Education program to identify strengths that can be replicated and scaled, reveal opportunities for growth, identify where to prioritize resource allocations, and illustrate recommendations for achieving beneficial student outcomes.

Key Budget Assumptions

The budget estimate is based on the following general assumptions:

- Budget includes overall operations and costs associated with the activities and actions of RTI staff included in the response to RFP requirements and proposed work plan (Tab E).
- Budget includes monthly, virtual check-ins (one-hour each) with HCPSS key staff.
- Onsite travel for data collection and review includes up to three (3) trips for two (2) staff for each trip.
- Comparative analysis is budgeted to include up to three (3) comparative districts.
- Reporting includes one (1) round of comments and reviews from HCPSS district staff. Feedback will be incorporated to create the final report.

Direct Labor

RTI’s Time & Materials labor rates are based on RTI’s GSA MAS Schedule, which the GSA has deemed fair and reasonable.

With the Labor Categories noted in the budget detail, RTI may utilize additional labor categories other than those reflected in the proposal so long as the ceiling is not exceeded. Any names included in the proposal are for informational purposes only, and RTI may also substitute personnel not listed as key as necessary to complete the work.

Budget Exhibit A: Labor Hours

Staff Name	Labor Category	Year 1 Hours	Total Hours
[Redacted]	Senior Professional 2	60.0	60.0
[Redacted]	Professional 2	130.0	130.0
[Redacted]	Professional 3	130.0	130.0
[Redacted]	Senior Professional 1	150.0	150.0
[Redacted]	Professional 1	130.0	130.0
[Redacted]	Senior Professional 1	140.0	140.0
TBD Editor	Professional 4	15.0	15.0

RTI business proprietary information that shall not be used or disclosed except for evaluation purposes.

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TBD Financial Analyst	Project Specialist	3.0	3.0
TBD SR Financial Analyst	Senior Project Specialist	3.0	3.0

***Bold** individuals indicate key personnel

Project Role Descriptions for Key Personnel

[Redacted] *Project Director*, is responsible for serving as the primary point of contact for the review. **[Redacted]** will lead a team of education consultants to conduct the special education review for HCPSS.

[Redacted] *Associate Project Director*, is responsible for working collaboratively with **[Redacted]** to oversee all data collection processes of the project.

[Redacted] *Content Specialist and Field Expert*, will support the administrative review of current Special Education programs and operations in HCPSS.

[Redacted] *Content Specialist and Field Expert*, is responsible for qualitative data collection and analysis.

[Redacted] *Content Specialist and Field Expert*, is responsible for quantitative data collection and thematic analysis.

Project Role Descriptions for Non-Key Personnel

[Redacted] *Data Analyst*, is responsible for processing and performing statistical analyses on datasets to interpret and understand the patterns.

TBD Editor is responsible for reviewing the report to ensure high-quality and accuracy, offering comments and suggestions for improvement.

TBD Financial Analyst provides oversight of the budget. This includes supporting the initial setup of the project, providing ongoing financial review and analysis for proper charging and accuracy, forecasting of costs, review of invoices, and preparation of contractually required financial reports. Financial analysts support a portfolio of multiple projects. If client reporting is contractually required, finance prefers to standardize reporting using existing systems for efficiency purposes. RTI is exempt, by name re OMB A-122 and is permitted to operate under "Commercial Cost Principles". Our Federally approved cost accounting system allows direct charging by project financial analysts.

Labor Rate Escalation

[Redacted]

Other Direct Costs (ODCs)

Travel Expenses

Purpose of Trip	From	To	Trips per Staff	Total Staff	Days per Trip	Cost per Person per Trip
Data Review Sessions	ILM	BWI	2	1	2	\$945.50

Data Review Sessions	RDU	BWI	2	1	2	\$1,184.50
Stakeholder Input	RDU	BWI	1	2	2	\$1,065.00

The data collection plan requires some onsite work. Members of the team will travel to HCPSS three times during the course of the evaluation process to conduct focus groups, review administrative data, and conduct observations.

All airfare quotes are obtained through the Bureau of Transportations Statistics website. RTI includes a \$25 ticketing fee onto all domestic airfare costs. Per Diem Meals are based on the 2023 GSA Domestic Travel guidelines. A local tax estimate of 15% is added to the lodging rate for each destination found in the 2023 GSA Domestic Travel Guidelines. When flying, a parking fee of \$20/day is priced for each traveler to park their personal vehicle at their departing airport. Additionally, A fee of \$35/per trip for each traveler is included for a checked bag. A rental car has been included at a rate of \$119.65/day.

Materials Expenses

Description	Unit	Unit Cost	Year 1 Quantity	Total Cost
Facilitation Materials	Each	\$500	1	\$500

General materials costs are budgeted for materials such as printed handouts, chart paper, markers, post-it notes, index cards, etc. that may be used to assist in the facilitation of any onsite data collection.

Other Business Credentials

RTI has an approved Contractor Purchasing System with the United States federal government, approved by the Department of Health and Human Services (DHHS) on March 1, 2024. RTI solicits and executes subcontracts in accordance with this approved system.

RTI has an approved Accounting System determined by the CMS Division of Financial Services on March 26, 2020.

RTI has an acceptable and approved Property Management System determined by Defense Contract Management Agency (DCMA) on September 1, 2020.

Per the terms of FAR 52.204-24, RTI will not provide covered telecommunications equipment or services on this contract and, based on the required reasonable inquiry, does not use covered telecommunications equipment or services. RTI has taken a comprehensive approach to ensure compliance with Section 889, including conducting the reasonable inquiry required and defined by the statute. This entailed developing a database of all equipment in use by RTI offices worldwide. Where any covered technology was used, we decommissioned it and, where necessary, replaced it with approved technology. We created a database of all of our telecommunication services providers (e.g., ISPs) and compared that list against a list of over 250 covered entities which includes subsidiaries and affiliates of the five named entities. None of our ISPs were included on this list. Based on this reasonable inquiry, reviewing the information within our possession, we have found no evidence that RTI’s service providers utilize covered technology. We have incorporated the relevant Section 889 provisions into our RFPs for the purchase of goods and services, as well as our purchase orders and subcontract agreements, to ensure appropriate flow down of these requirements. RTI has also implemented a company-wide policy, which has been disseminated to all five thousand employees worldwide, that prohibits the use of covered technology and

has set up a reporting mechanism for employees to report any covered technology. If we learn of any use of covered technology, we will immediately cease that use and disclose consistent with the reporting provisions of FAR 52.204-25.

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Research Triangle Institute



Proposal T&M Summary

Proposal : 0282401.672.00

Proposal Name: Special Education Review

			Year 1 11/2024 - 6/2025			Total	
			Hours	Rate	Amt	Hours	Amt
Labor	██████████	Senior Professional 2	60.0	██████	██████	60.0	██████
	██████████	Professional 2	130.0	██████	██████	130.0	██████
	██████████	Professional 3	130.0	██████	██████	130.0	██████
	██████████	Senior Professional 1	150.0	██████	██████	150.0	██████
	██████████	Professional 1	130.0	██████	██████	130.0	██████
	██████████	Senior Professional 1	140.0	██████	██████	140.0	██████
	TBD Editor	Professional 4	15.0	██████	██████	15.0	██████
	TBD Financial Analyst	Project Specialist	3.0	██████	██████	3.0	██████
	TBD SR Financial Analyst	Senior Project Specialist	3.0	██████	██████	3.0	██████
Labor - Total			761.0		131,966	761.0	131,966
ODCs		Domestic Travel			6,390	0.0	6,390
		Facilitation Materials			500	0.0	500
ODCs - Total			0.0		6,890	0.0	6,890
Overall - Total			761.0		138,856	761.0	138,856

RTI International Proprietary