



Request for Documented Quotation

State of Colorado

Colorado Charter School Institute

Documented Quote #:	DACA-2021000540	Research Regarding Students with Disabilities in Charter Schools
DQ Opening Date:	03/29/2021	
DQ Closing Date:	04/18/2021 5:00 PM MST	
Return all bids to:	CSI Procurement Unit, finance@csi.state.co.us	
Purchasing Agent:	Amanda Karger, Director of Finance	

Title:

Research Regarding Students with Disabilities in Charter Schools

Per the attached specifications, terms and conditions

Payment Terms: Minimum of Net 45

F.E.I.N.

Delivery Date:

Authorized Signature:

Typed/Printed Name:

Title:

Company Name:

Address:

City/State/Zip:

Phone Number:

Contact for Clarifications:

Title:

Phone Number:

E-Mail Address:

The purpose of the coversheet is to fully identify respondents so they may be considered, to quickly identify the costs and billing terms, and other basic information. Submit this coversheet (completed and signed), price page(s), supporting descriptive/technical literature for substitutes where applicable, and other enclosures requested or relevant to this solicitation. In the interest of minimizing processing time and economizing our resources, unrelated or unsolicited material submitted with offers will not be considered or retained on file. Vendors are to complete the presented format.

IMPORTANT: The following information must be in the subject line of the submission email, and included with the Electronic Bid:

- Bid Number -Opening Date and Time

Please be advised that all bids shall be submitted via e-mail. Due to State Offices operating on a limited schedule, faxed and hand delivered documents will not be considered. Bidders are urged to read the solicitation document thoroughly before submitting a bid. Bidders are required to submit Federal employer Identification Number (F.E.I.N.) prior to payment from the State of Colorado.

In accordance with Procurement Code, CRS 24-103-207.5 titled - Purchasing Preference for Environmentally Preferable Products; bidders responding to this solicitation may seek to qualify for the preference and governmental bodies conducting this solicitation shall award a contract to a bidder who offers environmentally preferable products subject to the conditions in the Code and Procurement Rules.

CSI reserves the right to reject any or all proposals, to waive informalities and minor irregularities in proposals received, and to accept any portion of a proposal or all items proposed if deemed in the best interest of the State.

This solicitation is published using the Colorado Operations Resource Engine (CORE). Vendor registration information, CORE and other State Purchasing Office information may be accessed at <https://codpa-vss.cloud.cgifederal.com/webapp/PRDVSS2X1/AltSelfService>

Service-Disabled Veteran Owned Small Business (SDVOSB)

HB14-1224/C.R.S. 24-103-903(2) sets a Service-Disabled Veteran Owned Small Business goal of at least 3% of all contracts by dollar value be awarded to SDVOSBs who must be incorporated or organized in Colorado or they must maintain a place of business or have an office in Colorado and who are officially registered and verified as a SDVOSB by the Center of Veteran Enterprise within the US Department of Veterans Affairs (www.vip.vetbiz.gov).

CSI shall give a certified SDVOSB a 5% preference in response to any DQ, IFB, or RFP published. SDVOSBs need to submit documentation of SDVOSB certification issued through the US Department of Veterans Affairs in their response to a solicitation. Certification can be received through the Center for Veteran Enterprise website (see above link).

1 Purpose

The purpose of this Request for Documented Quotations is to obtain competitive proposals from qualified individuals and firms to provide the following:

1. Study of Colorado charter schools’ provision of services for students with moderate-to-severe Needs
2. Study of the family experience with K-12 student choice in Colorado
3. Presentation of study findings to stakeholders

See Exhibit A, Scope of Work for additional details.

1.1. Schedule of activities

All Times are Mountain Standard Time / Mountain Daylight Time (MST/MDT)

DQ published on VSS	March 29, 2021	
Inquiry deadline	April 5, 2021	5:00 PM
Response to Written Inquiries (estimated)	April 9, 2021	
Submission deadline	April 21, 2021	5:00 PM
Notice of Award	April 30, 2021	
Award Period	Effective date through September 30, 2021	

All dates above are preliminary and are subject to revision by the State.

1.2. Contact Information

The sole point of contact concerning this Documented Quote is the Procurement Unit for CSI. All communication must be done via email through the CSI Procurement Unit at finance@csi.state.co.us

1.3. Schedule of activities

The State will award one or more Purchase Orders (PO)/Vendor Agreements from this solicitation. The State will consider proposals from qualified vendors who can complete all of the services sought, or from qualified vendors who can complete one of two studies and the presentation of that study’s findings. The successful bidder(s) will be awarded and issued a PO and Vendor Agreement with CSI. The contract will incorporate parts of this solicitation, published addenda, and the response of the awarded vendor. Except as modified herein, the State PO terms and conditions included as Exhibit C in this Documented Quote shall govern this procurement and are hereby incorporated by reference.

Bidders shall specify any payment terms, delivery terms, order minimums and/or delivery restrictions or conditions. The failure of the bidder to note any special condition or exception shall be deemed a waiver of any such condition or exception. Any service agreements, privacy forms or other documents which the State must agree to prior to

doing business with your company must be submitted with the signed bid. Unless otherwise noted, pricing shall include all bidder costs and shall be quoted "F.O.B Destination".

Bidders are advised that any condition or exception taken to the requirements of this solicitation may be grounds for rejection of their bid as non-responsive.

1.4. Contractual Obligations

Any additional terms and conditions proposed by the vendor must be submitted with their offer in order to be considered. The terms and conditions on any offeror(s) time sheets, invoices, or other forms, including but not limited to indemnification, limitation of liability, or cancellation fees, shall be void and of no effect against the State of Colorado or any of its employees. The offeror(s) and State's rights and obligations shall be solely governed by the terms and conditions of the contract. Any employee's signature on offeror(s) forms shall be effective only to establish receipt of services.

1.5. Term of Contract

The term of the resulting PO(s) and Vendor Agreement(s) is anticipated to commence on the Effective Date and will expire on September 30, 2021.

1.6. Definitions

"Colorado PERA" means Public Employee Retirement Association of Colorado

"Contract" means State of Colorado Purchase Order or State Contract

"CSI" means the Colorado Charter School Institute, a State of Colorado Type 1 Agency

"DQ" means Documented Quote

"F.O.B. Destination" means Free On Board Destination - seller pays for transportation to destination.

"Pricing Sheet" means Exhibit A – Scope of Work and Pricing Sheet

"Procurement Code" means CRS Title 24 Government - State, Articles 101 to 112

"State" means State of Colorado

"Vendor, Bidder, Offeror" means entity submitting a responsive bid to this solicitation

"Work" means the delivery of Goods and performance of the Services described in this DQ

1.7. Written Inquiries

Any inquiries must be submitted to the Point of Contact only as listed in Section 1.2 and must be submitted by the date and time listed in Section 1.1

1.8. Approved Equal Process

Not applicable to this Documented Quote

1.9. Doing Business in Colorado

A vendor wanting to do business in Colorado must register with the Colorado Secretary of State in accordance with Colorado Revised Statute (CRS) 7-90-801. The link for the Colorado Secretary of State's website is: <http://www.sos.state.co.us/>. If needed, an

Alphabetical Index to access Colorado Business Express for services for new and existing businesses and FAQ for frequently asked questions is available. A copy of the business entity's Articles of Incorporation and/or Bylaws may be requested by the State.

1.10. Federal E-Verify and Colorado Department of Labor and Employment Program

Effective May 13, 2008, Contractors who enter into a public contract for services with Colorado State agencies must participate in either the federal E-Verify program, or the newly created Colorado Department of Labor and Employment Program (Department Program). The option to enroll in the new Department Program instead of E-Verify was created by Colorado State Senate Bill 08-193, which amended the Public Contracts for Services and Illegal Alien Laws, 8-17.5-101 and CRS, C.R.S.

A copy of the Guide to Contractor Participation and copies of the Notice of Participation and Contractor Affirmation forms are included with this DQ as Attachment 1, 2 and 3. The awarded vendor shall submit these documents to the State prior to award.

1.11. Vendor Disclosure Statement

In compliance with CRS 24-102-206, Contractor Performance outside the United States or Colorado, the awarded vendor will be required to disclose information on where services will be performed under the contract by completing and submitting the Disclosure Statement to CSI. The awarded vendor will be required to submit these documents to the State prior to award.

1.12. Federal Employer Identification Number (F.E.I.N.)

Bidders are required to submit their F.E.I.N. prior to contract, or purchase order issuance, or payment from the State of Colorado. A W-9, Taxpayer Identification form provided by the State may be required. The awarded vendor will be required to submit these documents to the State prior to award.

1.13. Independent Contractor

The contractor shall perform its duties arising out of this solicitation as an Independent Contractor, and not as an employee. Neither the contractor nor any agent or employee of the contractor shall be or shall be deemed to be an employee of the State. The contractor acknowledges that the contractor and its employees are not entitled to unemployment insurance benefits unless the contractor or a third party provides such coverage, and that the State does not pay for or otherwise provide such coverage. The contractor shall have no authority to bind the State to any agreements, liability or understanding except as may be expressly set forth in the Purchase Order. The contractor shall provide and keep in force, workers' compensation and unemployment compensation insurance coverage in the amount required by law, and shall be solely responsible for the acts of the contractor, its employees and agents.

1.14. PERA

CSI is a Colorado PERA affiliated employer. Vendor shall comply with CRS §24-51-1101(2) and with PERA rules regarding contributions for PERA retirees.

CSI requires the vendor to notify CSI’s Procurement Unit via email at the email included in section 1.2 within fifteen (15) calendar days from the date of this contract if the services provided are being or are to be performed by a PERA retiree.

1.15. Insurance and Licenses

Awarded vendor must hold all applicable insurance coverages and licenses required to do business in the State of Colorado.

1.16. Demonstrated Performance Ability, Reference Requirements

Bidders should be able to demonstrate the ability to provide the requested services. Bidders are requested to submit three references for services of similar scope and complexity of work. Do not use CSI as a reference. Preferred Bidders have experience providing services as described in the specifications and requirements of this DQ.

The State may require additional information of the apparent successful offerors to determine their ability to perform. This information may include but is not limited to previous experience of company; years in business; quality and condition of equipment and financial condition.

	Reference 1
Legal Name of the Business	
Legal Business Address	
Contact Name and Title	
Contact Phone Number	
Period of Service: mm/yy to mm/yy	

	Reference 2
Legal Name of the Business	
Legal Business Address	
Contact Name and Title	
Contact Phone Number	
Period of Service: mm/yy to mm/yy	

	Reference 3
Legal Name of the Business	
Legal Business Address	
Contact Name and Title	
Contact Phone Number	
Period of Service: mm/yy to mm/yy	

1.17. Vendor’s Prior Services to CSI

One of the elements of this solicitation’s evaluation criteria will be the vendor’s past performance for CSI. This includes services and/or delivery of goods as well as any warranty work or replacements. The State reserves the right to consider vendor for this project. If the vendor has not previously provided services and/or goods to CSI specifically, then bidder should write “none” in the blocks below.

	Last Occurrences of Vendor’s Services Provided to CSI
1) Period of Service: mm/yy to mm/yy:	
Service Provided:	
Contracted Amount	
2) Period of Service: mm/yy to mm/yy:	
Service Provided:	
Contracted Amount	

1.18. Electronic Copy and Document Format

Proprietary/confidential information must be submitted on a separate drive and be clearly marked as such. Emailed bids shall not contain any blank pages between printed pages.

1.19. Modifications

All modifications shall be in writing and posted to VSS. Vendors are responsible for checking VSS prior to the opening date and time for solicitation modifications.

1.20. Public Opening of Bids

No public bid opening for this Documented Quote

1.21. Bidder Response Format

Submit one copy of the bid properly marked

Bidders must comply with and submit the following item(s) in order and clearly labeled:

- a) Signed cover sheet
- b) Completed bid response form detailing the bidder’s proposal to complete the work included in - Exhibit A – Scope of Work
- c) Completed Exhibit B - Pricing Sheet

- d) Completed references (requirements included in section 1.16)
- e) Complete summary of vendor's prior services to CSI (requirements included in section 1.17)

1.22. Performance Outside the State of Colorado and/or the United States

§24-102-206, C.R.S.: Following the effective date of issuance of a Purchase Order or State Contract, awarded Offeror shall provide written notice to the State, within 20 days of the earlier to occur of Awarded Offeror's decision to perform, or its execution of an agreement with a Subcontractor to perform, Services outside the State of Colorado and/or the United States. Such notice shall specify the type of Services to be performed outside the State of Colorado and/or the United States and the reason why it is necessary or advantageous to perform such Services at such location or locations. All notices received by the State pursuant to this Section 2.13.3.1 shall be posted on the Colorado Department of Personnel & Administration's website. Knowing failure by an awarded Offeror to provide notice to the State under this Section 2.13.3.1 shall constitute a material breach of the Award terms and conditions.

2 Scope of Services, Pricing, State Contract Terms

2.1. See Exhibit A "Scope of Services"

2.2. See Exhibit B "Pricing"

2.3. See Exhibit C "State PO Terms and Conditions"

Except as modified, the standard State PO Terms and Conditions (attached as Exhibit C) included in this DQ shall govern this procurement and are hereby incorporated by reference. Please note the State PO Terms and Conditions lists the State's and Federal required legal provisions but does not include the specific scope of work and requirements for this DQ.

The Offeror is expected to review the attached State PO Terms and Conditions and note exceptions. Offerors agreeing to abide by the requirements of this DQ are also agreeing to abide by the State PO Terms and Conditions. Unless the Offeror notes exceptions in its proposal, the State PO Terms and Conditions will govern. It may be possible to negotiate some of the wording in the final PO Terms and Conditions, however there are many provisions that cannot be changed. Offerors are cautioned that the State believes modifications to the standard provisions, terms and conditions constitute increased risk to the state and increased costs. Therefore, the scope of requested exceptions is considered in the award determination.

3 Evaluation and Award

The bid will be evaluated and awarded based on acceptable responses, price/cost being the primary consideration. Should the State determine that the apparent successful bidder is unable to meet the specifications and requirements outlined in this bid, award may be considered to the next most advantageous bidder.

Bidders must be capable of providing all of the required services outlined in this DQ. Bids for all of the required services pertaining to one or both studies and presentations will be

accepted. The bidder must specify which of the studies and related presentations they are proposing to provide. The State will be the sole judge in determining the acceptability of an offer and in determining the most beneficial offer to the State. Award shall be made with reasonable promptness to the bidder(s) who is determined to meet the requirements and criteria set forth in this solicitation with price/cost being the primary consideration.

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Exhibit A SCOPE OF SERVICES

Overview and Purpose

The Colorado Charter School Institute in partnership with the Colorado Association for School Authorizers (CACSA) and funded by the National Dissemination Grant, seeks to research proven strategies to help students with moderate to severe disabilities to appropriately access, enroll in, and receive services in Colorado charter schools. CSI also seeks to disseminate these strategies to support charter schools and districts improve their outreach, recruitment, and enrollment procedures to remove barriers that families may encounter when enrolling students with disabilities in charter schools.

1. CSI is seeking qualified vendors to conduct research that explores the traits of high-quality instructional programs in Colorado charter schools for students with moderate to severe special needs.
2. CSI also seeks a qualified vendor to conduct research that explores how families of children with disabilities navigate school choice in Colorado, with a focus on families attempting to enroll their children in Colorado charter schools in addition to families' considerations of charters relative to other local education options.
3. Vendor(s) selected to conduct the research must also write a report summarizing their findings, and present their findings to the stakeholder group.

Vendor Objectives

Conduct research and produce two research studies that explore the topics described below and present at workshop(s) that are convened by CACSA to help charter school authorizers and other stakeholders learn about the research and consider any recommended changes identified in the studies. The vendor will use mixed methods, potentially including analysis of data and materials from districts and schools, interviews, focus groups, and stakeholder surveys.

Create presentation materials and participation in workshop(s) that assist district authorizers in implementing any recommendations identified in the research studies.

Collaborate with CACSA and its partners to gather input from the CACSA Committee on Individualized Education which is comprised of CACSA member districts, CACSA's Executive Director, and CSI staff, to complete the following objectives, which are fully described below:

1. Task 1: Study of Colorado charter schools' provision of services for students with moderate-to-severe Needs

In collaboration with CACSA and CACSA members, conduct a study and produce a report to identify traits of high-quality instructional programs in charter schools for students who require moderate to significant support and identify the characteristics of the school design, funding, district relationships, and school personnel that contribute to their success. Include analysis of strategies adopted within the state and in other settings as well as analysis of the impact of these programs on enrollment, services, and outcomes. Include: 1. Analysis of the use of Center Based Programs by charter schools authorized by Denver Public Schools, as well as approaches to serving such students in other Colorado districts; 2. Descriptions of approaches to serving such students in other states that provide appropriate services to similar students in charter schools.

The production of this report includes a research design, outline, first draft, and final. The final report is due by August 1, 2021.

2. Task 2: Study of the family experience with K-12 student choice in Colorado

In collaboration with CACSA and other partners, conduct a study and produce a report describing how families of children with disabilities navigate school choice in Colorado, focusing on but not exclusively describing families attempting to enroll their children in charter schools as well as the families' considerations of charters relative to other education options available locally. The study will primarily focus on charter schools and will also explore families' experience with other forms of public school choice, including district-run open enrollment systems, inter- and intra-district open enrollment; magnet, focus, and innovation schools, and other strategies and processes that allow families to choose their school. The report will include recommendations to address identified challenges. Analysis should include focus groups, survey, and other strategies.

The production of this report includes a research design, outline, first draft, and final. The final study is due by August 30, 2021.

3. Task 3: Presentation of study findings to stakeholders

In collaboration with CACSA, and other partners as appropriate, design and conduct full-day, on-site workshop(s), or a series of remote events that allow for safety and social distancing appropriate for that time and geography. Workshops will be designed for charter school authorizers, as well as other district staff and relevant stakeholders, to support improved access, services and outcomes for students with disabilities in charter schools. The workshops will provide information on the findings of the research studies and provide recommendations and assistance for authorizers and charter schools to learn from and potentially act on the research. Price and

description should be based on a single full-day workshop, although CACSA reserves the right to convene multiple workshops.

The materials will be provided in draft and in final at workshop(s) to be convened by CACSA. The workshop is to be completed by September 21, 2021. The workshop may be in a full-day, in-person meeting in the Denver, Colorado area if it is safe to do so. Alternatively, the workshop(s) may be presented via one or a series of video conferences.

Reporting and Support Requirements

The vendor is required to meet regularly with the CSI representatives and CACSA executive director and CACSA Committee as needed. The two research studies will require the delivery of a research design, outline, full draft of the report, and final full report. The delivery schedule for these sub-tasks will be agreed upon by CACSA, CSI, and the awarded vendor. The Vendor will incorporate feedback from CACSA after the submission of the research design, outline, and full draft of each report.

Project Management Requirements

The Vendor will provide a work plan and calendar outlining the completion of all reported tasks, and will meet regularly with CACSA Executive Director, and monthly with CSI, and make reports on the progress of all work.

Requirements

The proposal must address all work or project requirements necessary to perform the services set forth above, including a complete description of the proposed approach and methodology for the project, all project requirements, and the tasks required to accomplish the project. The plan must be in sufficient detail to convey to the evaluation team the vendor's knowledge of the subjects and skills necessary to perform the services.

Neither the vendor nor any of the vendor's agents (principals, employees or subcontractors) has presently or will have during the term of the resulting PO or contract an actual or potential conflict of interest or lack of objectivity pertaining to the Statement of Work.

Please limit your response to this DQ to ten (10) pages, excluding resumes, exhibits and/or marketing materials.

Unnecessarily lengthy responses are not desired. Responses exceeding 35 pages for the entire proposal (including resumes, exhibits and/or marketing materials) may disqualify a

vendor from consideration. Font size for basic narrative descriptions must be no smaller than 11-point.

The proposal must include:

- A summary of the vendor's background and experience, including experience assisting organizations involved in the charter school sector such as charter school authorizers, charter school management organizations, foundations, or school districts.
- Name, addresses, and phone numbers of three (3) individuals from organizations that have recently (within the past 12 months) procured similar services to act as references. The individuals identified must at least hold a position of project management or other contract authority.
- Project Plan and QA/QC Plan: Provide a detailed description of project completion, including strategies that can inform practical steps that authorizers and schools can adopt to improve equitable access and to better inform decisions by parents and students.
- Example Product: Submit a sample from similar work completed by the Respondent that best matches the specifications listed in the DQ. Please include a brief description of what the original included, and what data was created/developed by you or your firm.
- Schedule: Provide a proposed work schedule showing completion of initial implementation by September 30, 2021.
- Price: The proposal should address any additional costs that CSI might incur through the use of the system, in addition to the quote.

The proposal must specifically address the following qualifications:

1. Conducts research and evaluation in programmatic areas and provides research-based support and improvement services to educators, parents, and community members;
2. Demonstrates expertise specifically pertaining to charter schools at both national and state levels;
3. Conducts special education program evaluations;
4. Has a strong background in a variety of content areas related to the intended task, including conducting both qualitative and quantitative research.

Work Completion and Delivery

All work required under the contract awarded from this Documented Quote must be completed no later than September 30, 2021, unless an extension is approved in advance by CSI. The State estimates that the total cost for this contract(s) should not exceed \$75,000.

Exhibit B PRICING

Pricing Section

	Rate per hour	Hours	Total Fee
a) Professional Staff	_____	_____	\$_____
(b) Total other fees and expenses (provide details below)			\$_____
(c) Total expenses for the entire contract (a+b)			\$_____