

# Amendment 1 to RFP No. 2017-RFP-160

Washington State Regional Educations Needs Assessment – Focus Group Engagement

Washington Student Achievement Council (WSAC)

## Changes to the RFP

There are no changes or amendments to the RFP.

## Questions and Answers

WSAC received the following **questions** from potential bidders. WSAC's response follows each question. Please note: Some of the responses indicate areas that will be included in the proposal evaluation. This does not imply any particular weight on those factors.

**Question: What contractors, if any, have you worked with on this or similar work in the past?**

Answer: We have worked with several different contractors on focus group engagement projects in the past, most of which have had extensive experience with education-related research.

**Q: Can you please describe what has worked best about your relationship with your most recent agency/contractor, and what you'd like to change or improve on in working with the successful bidder?**

A: In our experience, the most successful projects with contractors have been grounded on well-designed methodologies and work plans and have been characterized by excellent communication throughout the process with our policy staff team.

**Q. On page 1 in section 1.1 you reference this work complementing a quantitative study being completed soon. Who is completing that study?**

A: This quantitative study is being prepared by policy staff at the Washington Student Achievement Council.

**Q: What tools are already in place that might help with recruiting the right people in each area to participate in the research (existing email lists, access to groups where they people gather already, etc.)?**

A: Each bidder's general approach to recruiting focus group participants, reflecting their familiarity with available resources in the various regions, will be a key evaluation topic and judged as an important component of the work plan.

**Q: What do you see as your role, if any, in the process to recruit focus group participants?**

A: The successful bidder will have primary responsibility for recruiting focus group participants. The project team at the Washington Student Achievement Council may provide feedback and suggestions during the course of the assignment.

**Q: Have you ever tried recruiting research participants from this same pool before? If yes, please describe your experience and what incentive you used.**

A: The proposed approach to recruiting and incentivizing focus group participants, reflecting their familiarity with available resources in the various regions, will be a key evaluation topic and judged as an important component of the work plan.

**Q: Do you require focus groups be held at professional research facilities with two-way mirrors, or are you open to a more informal approach?**

A: The successful bidder will describe its research-based methodology for convening and conducting the focus groups within the context of meeting in regionally convenient locations.

**Q: Can you please describe the level of reporting you wish to see (cross tabs, question by question, higher level key findings only, etc.)?**

A: Proposed plans for reporting and presenting analyses of focus group data is included in the evaluation criteria for Project Approach and Methodology and is left to each bidder to decide how best to proceed.

**Q: Can you describe who the successful bidder will work with on your team? Is there a committee involved? Who gives final approval on things?**

A: The successful bidder will work with a project team consisting of policy staff from the Washington Student Achievement Council and may include additional members from agency partners with a focus on education and the workforce. The agency contract manager identified in Exhibit B of the RFP will approve all work plans, proposed activities, and final work products.

**Q: Can you please share the names and roles of the people on the evaluation team?**

A: The evaluation team has not yet been confirmed, but it will include policy and research staff from the Washington Student Achievement Council and additional members drawn from key agency partners.

**Q: I see the deliverable schedule includes the survey (as part of the item, Report of findings from convening focus groups and surveys – draft due September 15) so am I to assume that you definitely want bidders to prepare a quote for a survey in addition to the focus groups?**

A: Surveys are mentioned as a potential approach that bidders may consider. They are not a requirement. The decision to include one is completely up to the bidder.

**Q: Do you have additional information on the planned scope of the survey (e.g., sample of employers) or are you intending to leave it up to the bidder to define a scope?**

A: The scope of the project, including whether or not to incorporate a survey, is left to each bidder.

**Q: Recruitment sample: We can certainly find ways to identify each of the stakeholders you cite, however, are there any of these that you will be able to provide lists for to simplify that process? For example, STEM Network representatives, members of the Workforce Development Councils or labor representatives might be more readily to you internally than to a supplier.**

A: Once a contractor is selected for this project, the policy team at the Washington Student Achievement Council will be able to assist with guidance in connecting with these groups, as needed. Familiarity with these organizations and a well-developed plan for utilizing their resources will be among the criteria on which proposals will be evaluated.

**Q: Who is conducting the complimentary quantitative survey cited on page 1, paragraph 1 and what is the status of the survey?**

A: This quantitative data analysis is being prepared by policy staff at the Washington Student Achievement Council. As mentioned in the RFP, it is planned for completion in the early spring of 2017, likely around the end of March.

**Q: How are you defining focus groups and why are you specifically motivated to conduct focus groups rather than other complementary methodologies?**

A: In this context, we define focus groups as sets of regional stakeholders, with insider knowledge of current and evolving education needs in their areas, that are assembled to participate in guided discussions to elicit their perspectives. This is one of the most efficient ways to gain insights into emerging changes that might not be evident by analyzing historical trend data. For example, some of things we hope to learn from this process is information regarding emerging economic trends, employers' long-term planning that may affect student demand and community needs in the distinct geographic areas of the state.

**Q: Are you open to other qualitative data collection methods?**

A: Yes. As mentioned in the RFP, we would be open to a survey (such as an employer survey) being used in conjunction with the focus group discussions. Also, we anticipate that the successful bidder will likely conduct literature reviews of publications prepared by key

organizations in each region (for example, Workforce Development Council reports) to prepare for the discussions.

**Q: Has this work been done in the past? If yes, what methodology was used and is there a report we could review?**

A: This is the first time that this type of regional focus group study has been planned.

**Q: Are you able to provide contact lists for any of the 9 target groups?**

A: Once a contractor is selected for this project, the policy team at the Washington Student Achievement Council will be able to assist with guidance in connecting with these groups, as needed. But familiarity with these organizations and a well-developed plan for utilizing their resources will be among the criteria on which proposals will be evaluated.

**Q: Do you have priorities by area (ESD) or by target groups? Have you established any priorities within the topics to be discussed in the focus groups?**

A: We anticipate, while there will likely be some common elements, distinct issues will become clarified and rise to salience in each region during the course of the project.

**Q: Can you clarify what you mean by Section D in page 12, regarding “impacts/outcomes” we propose to achieve as a result of the delivery of our services?**

A: This section is included as a standard feature in all of our RFPs. In the context of this project, the impacts/outcomes discussed in this section should focus on performance measures of how the work carried out will meet the overall goals outlined in the RFP. For example, the impacts or outcomes might include (1) ensuring that feedback is received from all key stakeholder groups in each region and (2) generating meaningful insights into emerging economic, employment, and workforce demand trends for each region.

**Q: Who would we be working with? Staff/other consultants?**

A: The successful bidder will work with a project team consisting of policy staff from the Washington Student Achievement Council and may include additional members from agency partners with a focus on education and the workforce.

**Q: How many individuals are desired per each of the nine (9) regional focus groups?**

A: We currently do not have a specific number in mind; this is a practical matter that each prospective bidder will have to consider. The policy team at the Washington Student Achievement Council will work with the successful bidder to refine the focus group design; this will likely be a topic that will need to be addressed.

**Q: Is it the responsibility of the consultant to recruit regional employers and community leaders for participation in the focus groups and surveys or is that a list that the agency will provide? Will the parent and/or student focus groups be separate from those conducted with regional employers, industry/labor/non-profit or community group stakeholders?**

A: The policy team at the Washington Student Achievement Council will work with the successful bidder on the final design of the focus groups and help refine the list of invited participants. The primary responsibility for recruiting will rest with the successful bidder along with any decisions about work plan methodology like whether or not to hold separate focus group discussions.

**Q: Is the survey instrument to augment the focus groups or to secure input from regional employers and/or community leaders unable to participate in the focus groups? Is the survey focused on employers or is there the desire for broader stakeholder input?**

A: Yes, we mentioned the optional use of a survey in the RFP as a potential vehicle that would augment the results of the focus groups. To be clear, this is not a requirement of the project. A survey would perhaps be best employed to solicit feedback from employers and community leaders. How this instrument would be incorporated in the project would be up to the successful bidder.

**Q: Please define the nine (9) geographic regions as distinct from the ten (10) communities canvassed for the 2013 Roadmap of 1) Bellingham 2) Cheney 3) Ellensburg 4) Olympia 5) Pullman 6) Richland 7) Seattle 8) Spokane 9) Vancouver and 10) Walla Walla.**

A: The nine geographic regions correspond to the state's Educational Service Districts (ESDs). A crosswalk is provided in the RFP which shows how the counties match up with the districts. As mentioned, in a few cases, there are some slight county overlaps. As you noted, these are different than the regions referenced in the Roadmap. The primary reason the ESDs were chosen to define the regions for this study is that it allows the ability to directly incorporate data for the K-12 education sector.

**Q: Will the State of Washington be able to provide sample containing the names and contact information (names, phone numbers and email addresses) for each of the following:**

- **Members of the Educational Service District leadership,**
- **The Workforce Development Councils,**
- **Washington Regional STEM Network representatives,**
- **Community leaders,**
- **Labor representatives,**
- **Industry representatives,**
- **Educational leaders from public and private K-12 and post-secondary sectors.**

A: Once a contractor is selected for this project, the policy team at the Washington Student Achievement Council will be able to assist with guidance in connecting with these groups, as needed. But familiarity with these organizations and a well-developed plan for utilizing their resources will be among the criteria on which proposals will be evaluated.

**Q: In the insurance section, there is a clause which states the State of Washington, the AGENCY, its elected and appointed officials, agents, and employees shall be named as an additional insured on all general liability, excess, umbrella, and property insurance policies. Does the State of Washington have a procedure for making these additions?**

A: The State of Washington does not have a procedure for this. The successful bidder will need to contact their insurance carrier(s) and ask that we be listed as an additional named insured on their policy. Their insurance carrier should be familiar with this process.

**Q: Are there specific areas within the nine (9) regions that the team desires to cover for in-person groups? (Seattle and Pullman are the largest University areas – not as much in the North East or Central Regions)**

A: The policy team at the Washington Student Achievement Council will work with the successful bidder to refine the design of the in-person meetings. As part of the proposal process, we would like to see how familiar the prospective bidder is with the various regions in the state and show how it would plan to approach this part of the project. These will be key evaluation criteria in our proposal reviews.

**Q: The RFP mentions that the same firm may do both quantitative and qualitative, but there are no quantitative specs in this RFP.**

**“This work will complement a quantitative data analysis of Washington’s regional educational needs to be completed in the early spring of 2017. The quantitative component of the assessment is aimed at developing broad economic profiles, highlighting major growth industries and occupational sectors, as well as educational and demographic profiles, looking at key factors such as regional education attainment and participation rates.”**

- a. Is there a separate RFP for the quantitative survey?**
- b. How much research is there? (sample sizes etc.)**
- c. What type/modality?**
- d. Will the same stakeholders be targeted in the quantitative effort as are outlined in the qualitative proposal?**
- e. How will the quantitative research reporting correlate with the quantitative effort?**

A: There will be no RFP for the quantitative analysis. The quantitative analysis is being prepared by policy staff at the Washington Student Achievement Council. As mentioned in the RFP, it is planned for completion in the early spring of 2017, likely around the end of March. The results

of this study will be made available to the successful bidder before the formal start of the project to inform the design of the focus group engagement.

**Q: What specific information is the team looking to find among students and parents in K-5th grade? Would the council be open to considering the inclusion of 6th – 12th Grades?**

A: We included K-12, taken broadly, as a sector from which we would like to get feedback - from students and parents as well as education professionals - because it forms a continuum from elementary to secondary. When we look at the subject of employer workforce demand, for example, it makes sense to focus more on career- and college-readiness among middle and high school students. But that does not mean that we can ignore factors affecting early and elementary education. For example, we know that it is important in STEM subject areas that access to high-quality curricula beginning at the early or elementary school level strongly affects subsequent educational attainment.

**Q: Who is conducting the quantitative analysis? Are they eligible to bid on this RFP?**

A: The policy staff at the Washington Student Achievement Council is conducting the quantitative research. No RFP will be issued for this work.

**Q: What is the timing of the release of the quantitative information? Is there an assumption that it will directly inform the qualitative work?**

A: Yes. The quantitative analysis is being prepared by policy staff at the Washington Student Achievement Council. As mentioned in the RFP it is planned for completion in the early spring of 2017, likely around the end of March. The results of this study will be made available to the successful bidder before the formal start of the project to inform the design of the focus group engagement.

**Q: Is the expectation that all stakeholder categories in all regions? What is the total expected number or respondents in each region and/or county?**

A: Yes. It is our expectation that all of the stakeholder categories would be represented for each region. However, if the successful bidder has a good reason to think that some should be excluded in a particular region, some flexibility could be allowed. We currently do not have a specific number of respondents in mind and that is a practical matter that each bidder will have to consider. The policy team at the Washington Student Achievement Council will work with the successful bidder to refine the focus group design; this will likely be a topic that will need to be addressed.

**Q: Is the expectation that all focus groups are conducted in person or is telephonic communication also possible?**

A: Our expectation is that at least some in-person focus groups would be held in each region. But flexibility is allowed to supplement these with other methods of gathering information.

**Q: What type of contract does WSAC expect to award (e.g., time and materials, firm fixed price)?**

A: Actual allowable expenses for salary, benefits, indirect, and travel. Please refer to the sample contract in Exhibit B of the RFP.

**Q: Does the proposal need to include proof that the proposing firm meets all insurance requirements?**

A: A prospective bidder does not need not meet the insurance requirements outlined in the RFP at the time it bids. The successful bidder would be required to meet the insurance requirements, if awarded a contract.

**Q: What level of detail is expected for the budget? Is total number of staff hours and associated costs plus a summary of other expenses sufficient or is there more detailed information required? The contract breaks out costs by state FY? Is it required that the budget do the same?**

A: Invoices will need to include enough detail to assure all expenses are reasonable and allowable. For the RFP response, a summary table breaking out expenses into expense categories is acceptable. That being said, the more detail the prospective bidder provides, the better. Payments for services render will be tied to the successful completion of listed deliverables in the contract. The prospective bidder needs to provide a list of proposed deliverables and estimated completion dates – that will define for us which fiscal year the payments will need to be made.

**Q: Which firm is on contract to complete the quantitative component to this work?**

A: This work has not been contracted out. The quantitative analysis is being prepared by policy staff at the Washington Student Achievement Council. As mentioned in the RFP it is planned for completion in the early spring of 2017, likely around the end of March. The results of this study will be made available to the successful bidder before the formal start of the project to inform the design of the focus group engagement.

**Q: Is that firm able to bid on this RFP?**

A: No RFP is being issued for the quantitative analysis.

**Q: Is the agency open to both online and in-person focus groups to cover all parts of the state?**

A: Yes. We anticipate that in-person focus groups would be held in all of the regions. But other methods of communicating with regional stakeholders could be used to supplement this activity.

**Q: Are you wed to a particular type of survey platform (i.e. phone vs. mail vs. online?)**

A: No. The particular type of survey used would be up to the successful bidder.

**Q: The website says “The project may also include surveys of employers and other stakeholders.” Is there a predefined list of employers and stakeholders, with contact information?**

A: No. There is no predefined list of employers and stakeholders. The policy team at the Washington Student Achievement Council will assist the successful bidder with guidance on deciding on groups to be contacted and in connecting with these groups, as needed. Familiarity with these organizations and a well-developed plan for utilizing their resources will be among the criteria on which proposals will be evaluated.

**Q: Who is the intended audience for the final report?**

A: The primary audience for the final report will be the Washington Student Achievement Council. The successful bidder will also be asked to give a presentation at one of our Council meetings. The results of the report will be incorporated into broader report that will combine insights from both the separately conducted quantitative analysis and the focus group work.

**Q: What role will WSAC play in the identification and recruitment of focus group/survey participants?**

A: The policy team at the Washington Student Achievement Council will assist the successful bidder with guidance on deciding on groups to be contacted and in connecting with these groups, as needed. Familiarity with these organizations and a well-developed plan for utilizing their resources will be among the criteria on which proposals will be evaluated.

**Q: Are there any specific expectations about the composition and organization of the focus groups? For example, are you more interested in role-alike statewide groups, regional cross-sector groups, or a combined approach of clustering sectors (e.g. education, industry, family & community) within geographic regions?**

A: When we begin working directly with the successful bidder, the policy staff at the Washington Student Achievement Council will collaborate with their team to refine the research design and decide on these sorts of issues. We are interested to see how each prospective bidder proposes to approach the work, reflecting their knowledge and expertise in this area.

**Q: Are there any restrictions on offering incentives to focus group participants?**

A: Yes. Incentives to focus group participants are not permitted.

**Q: Page 12, Note on Page Limits. “While the technical proposal is limited to 12 total pages, the lengths of component sections are discretionary.” Please confirm that the Management Proposal (including Project Management, Experience of the Bidder, Related Information, and References) are excluded from the 12-page limit.**

A: Yes. The Management Proposal sections are excluded from the 12-page limit.

**Q: Please confirm that resumes may be submitted as an appendix.**

A: Yes. Resumes (limited to 2 pages for each) may be submitted as an appendix.

**Q: Page 4, section 1.4 – Contract is contingent in the availability of funding – is funding for the award amount fully secured?**

A: Government contracts are typically made “contingent on the availability of funding,” because public agencies may be required to reduce or eliminate funding for a particular activity. While we have no reason to suspect that this project will not be fully funded, this sort of contingency clause is a caveat that we are required to include in our procurements and contracts.

**Q: Under the qualification section, point D says “proven ability to conduct research with human subjects and gain institutional review board approval for this project.” Can you elaborate on this qualification? For example, if the bidder meets every other qualification criteria but has never attempted nor needed IRB approval in their prior research projects, will they be considered non-responsive? We’ve never been required to go through an IRB process before, even when conducting very similar scopes of work for state and federal agencies. Therefore, we just want to better understand this requirement as it relates to this project and whether it disqualifies us outright.**

A: Lack of experience in the Institutional Review Board (IRB) approval process is not a disqualifier. To be responsive to this RFP, please do address these qualifications in your proposal.

**Q: Do the focus groups need to be conducted in person or could we conduct virtual focus groups (webinar-style) where people could see each other but dial in from home or work?**

A: There should be at least some in-person focus groups convened in each region, which could be supplemented by virtual webinar-style sessions.

**Q: Can you clarify what you mean when you say “all counties should be included in the study?” Does that mean we need representation from each of the stakeholder groups in each county?**

A: In general, we would like to see representation from each of the stakeholder groups in each region. That would include some participants involved from each of the counties. But some flexibility is afforded to make reasonable decisions about the types of representation that would be most appropriate from each county.

**Q: Assuming virtual is OK, if scheduling constraints prevents a stakeholder from participating, could they be contacted for an interview or must each person be part of a focus group?**

A: Flexibility will be allowed for alternative methods of communication in the case of certain individuals that are unavailable for scheduled focus group sessions.

**Q: When do you expect the quantitative analysis to be available?**

A: As mentioned in the RFP, it is planned for completion in the early spring of 2017, likely around the end of March. The results of this study will be made available to the successful bidder before the formal start of the project to inform the design of the focus group engagement.

**Q: Are you expecting focus groups to be organized by role or do you want them to be cross-functional? (eg. just educators vs. an educator, an employer, a labor rep all together)?**

A: They should be organized as cross-functional discussions.

**Q: We have contacts in some of these places but not all—would WSAC lend support to get attention for the project from key stakeholders?**

A: The policy team at the Washington Student Achievement Council will assist the successful bidder with guidance in connecting with these groups, as needed. Familiarity with these organizations and a well-developed plan for utilizing their resources will be among the criteria on which proposals will be evaluated.

**Q: The research concludes 12/31/17—what type of product are you expecting the bidder to deliver? A paper? Something else?**

A: In addition to the final report, the successful bidder will give a presentation of the results at a meeting of the Washington Student Achievement Council.

**Q: Just out of curiosity—what is prompting this research and what are you hoping to do with it?**

A: This work is related to the Washington Student Achievement Council's statutory responsibility to conduct education needs assessments for the state of Washington. This will provide a regional complement to our biennial Skilled and Educated Workforce Report, which focuses on state-wide needs.

**Q: The RFP is very clear on the purpose of the work can you describe more about how the work will be used and by whom? Is this report is aimed providing educational institutions with this input so they can develop appropriate degree programs and curriculum? Is the target usage of the report for K-12 program development or higher education?**

A: The primary audience for the report is the legislature and the Governor's office, with the aim of informing policy regarding system-level design, capacity issues, and the need for program expansion in specific fields. The report may also potentially be used by leadership in the various educational sectors, such as the State Board for Community and Technical Colleges or the Office of Superintendent for Public Education, to guide assessments for program development.

**Q: How does this work compare or fit with the issue briefs WSAC has produced in the past?**

A: The Washington Student Achievement Council has conducted regional education needs assessments in the past, the last one issued several years ago. These assessments relied primarily on quantitative data. The focus group engagement incorporated into this year's report will afford a much deeper perspective on emerging changes in regional landscapes that would not usually be revealed in historical trend data.