

Academic Strategist Services

Request for Qualifications

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Response Due Date:	Jan. 19, 2024
Submission:	RFQ Submission Portal
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RFQ Introduction

Company Background

Bellwether is a national nonprofit that exists to transform education to ensure systemically marginalized young people achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we work hand in hand with education leaders and organizations to accelerate their impact, inform and influence policy and program design, and share what we learn along the way. For more, visit bellwether.org.

Our exclusive focus on education allows us to provide unparalleled experience and expertise to meet our clients' needs through a range of customized services. Our team's deep background across public and private sectors — as former teachers and educators, school leaders, management consultants, policymakers, government officials, and nonprofit executives — gives us a unique understanding of the critical issues facing education leaders.

We look around the corner at challenges facing our sector, share learnings and tools that drive solutions, and scale impact through communities of practice, networks, convenings, and publications.

Our Academic and Program Strategy Services

Through tailored one-on-one collaborations and multi-school cohorts, our academic and program strategy team helps schools and networks start strong, diagnose emerging challenges and gaps, improve results, and grow with quality. Our advisers deepen and expand the impact of school programming by supporting new schools through early-stage planning, helping leaders scale impact, and building improvement plans for existing schools. This work includes assessing school quality, examining achievement gaps and other manifestations of inequity, establishing strong teacher and leader coaching systems, developing a comprehensive approach to school culture, facilitating professional development to support capacity building, and providing executive coaching of school and network leaders.

Our academic and program strategy work tends to cluster into the following categories:

- **New school planning and support:** We support the planning and development of new schools that are bringing innovative learning models to students. With in-house expertise

in school founding and design, we bring knowledge of the multiyear planning steps, best practices, and potential pitfalls as we help new schools thrive.

- **School improvement support:** Running high-quality schools is not an easy task. Some schools may experience dips or gaps in student results, challenges with adult and student culture, or competing priorities when implementing initiatives. Other schools may strive to push performance from “good” to “great.” With experience managing full-scale school turnarounds and sustaining school improvement, we help schools develop nuanced plans to refine instructional systems and practices, strengthen leader capacity, and ensure execution with fidelity. In all projects, we create a tailored plan to get at the heart of improvement challenges, keep issues of educational equity front and center, and support inclusive stakeholder engagement and change management strategies necessary for success.
- **Scaling impact:** Whether your goal is to serve more students or identify components of your current model for focused improvement, Bellwether can support tangible action planning to increase your impact. We use a school health assessment to discover program/school strengths and areas for improvement. With our deep experience operating and leading schools, our team can strengthen your current school program or pinpoint program elements to maximize over time.

SAMPLE CLIENTS: Seguin ISD, Albemarle County Public Schools, Charter School Growth Fund, NewSchools Venture Fund, New Schools for New Orleans, Opportunity 180, Great Minnesota Schools Fund, Green Dot Public Schools, Texas Education Agency, Excellent Schools New Mexico, DC International Charter

Confidentiality Statement

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Purpose

Bellwether seeks to select a pool of qualified contractors/vendors that can assist its academic strategy team with supporting education leaders. Temporary project assignments may range from conducting school health assessments for six weeks to coaching/advising on a strategic plan/cohort for 14-20 weeks. Once qualified, contractors/vendors may rapidly respond to project-specific proposals (“mini-bids”) released by the Bellwether Academic and Program

Strategy and/or Strategic Advising team. This RFQ aims:

- To offer an opportunity to become a pre-qualified contractor/vendor to Bellwether's Academic and Program team.
- To provide each potential Respondent with the descriptive background of key skills and experiences requested for Bellwether's academic strategy support services.

You are being invited to share your qualifications that meet the requirements described in this RFQ.

Description of Services

Bellwether seeks external support for services related to our Academic and Program Strategy practice. Current project needs include: (1) conducting school health assessments as phase 1 of a strategic planning process; (2) coaching/advising a cohort of school and network leaders toward aligned goals; (3) leading a stakeholder engagement process. A description of key skills and experiences requested can be found below:

- Bachelor's degree from an accredited college/university
- Minimum of five years of successful school/district/network leadership experience
- Deep knowledge of and experience in curricular materials, instructional strategies, positive school culture and whole child support practices, data analysis, adult learning, network/systems development and management, and/or family and community engagement and investment
- Experience developing or implementing multiyear strategic plans that enabled high-quality school outcomes
- Ability to develop insights and recommendations that support strategic learning acceleration and achievement gap closure
- Understanding and ability to coach toward principles of strong school design
- Strong adaptive leadership skills
- Project and team management experience
- Effective communication, collaboration, and interpersonal skills
- Prior consulting experience is a plus

Response Instructions

Response Submission Due Date

Responses should be submitted via the [RFQ Submission Portal](#) by Friday, January 19, 2024, at 11:59p.m. ET. Submissions received any other way will not be considered.

Late Responses

Bellwether reserves the right to accept or reject without consideration any response that does not fully address the requirements of the RFQ or arrives at the designated address and contact after the response submission due date and time identified.

If portions of the response do not comply with any specifications, items, or scope of the RFQ, the Respondent should clearly highlight any such noncompliance for easy identification.

If the response is at variance with the requirements of any item in the RFQ, then the Respondent shall describe in detail, with full support data, the reasons why the response still meets the request and should not be considered an exception to the RFQ or be treated as a partial response. Each response classified as a variance statement should be clearly identified.

Evaluation and Selection Criteria

Each response received must adhere to the instructions, format/content, and specifications. This will ensure that evaluation criteria can be systematically applied to all respondents. The major criteria categories for selection and evaluation are listed in priority order:

- Completeness of response
- Performance task submission and quality
- Interview with Academic and Program Strategy leaders
- Strength of technical skill alignment as demonstrated by responses and work products
- Competitive costs for services provided
- Flexibility of the Respondent to meet potential project needs, including travel, working hours, and commitment to tailored excellence
- Alignment with Bellwether's DEI (Diversity, Equity, and Inclusion) commitments

Performance Task

Respondents who are advanced based on a review of the qualifications will be asked to complete a performance task that assesses school academic and program expertise. Chantavia

will notify each submitting respondent of the decision to proceed with a performance task or not. This will be the final decision for qualification under the RFQ. Receiving and submitting a performance task should not be considered an acceptance or agreement to contract with Bellwether.

Interview

Respondents who submit qualifications that meet the request described and an acceptable performance task deliverable will be recommended to attend a final interview with leaders of the Academic and Program Strategy team. Chantavia will notify each submitting respondent of the decision to grant an interview or not. This will be the final decision for qualification under the RFQ. Receiving and attending an interview should not be considered an acceptance or agreement to contract with Bellwether.

Final Selection and Award

Chantavia will notify each participating respondent of the selection/approval or denial of their qualifications submission. This will be the final decision for qualification under the RFQ. Bellwether reserves the right to reject any portions of or all proposals without giving reason for the rejection, and to curate a pool of contractors/vendors of their choice.

No qualifications will be deemed final until the contractor/vendor executes a Master Services Agreement with Bellwether. The selection and contracting process will not be separate.

Additional Clarifications and Questions

We are committed to a transparent and equitable RFQ process. As a result, we will publicly respond to all clarification requests and follow-up questions [here](#). Please check the website before submitting additional questions to the Strategic Advising Chief of Staff, Chantavia Moore, at chantavia.moore@bellwether.org.

Respondent Questionnaire

Complete responses must comport with the following format. For any questions that do not have an answer due to your unique context, please list N/A to ensure completeness of response.

A. Executive Summary:

- a. Name:
- b. Name of your company, if applicable:

- c. Mailing address:
- d. Phone number:
- e. Email address:
- f. Languages spoken fluently:
- g. URL, if applicable:
- h. LinkedIn profile:
- i. Prior existing relationships within Bellwether:

B. Qualifications:

- a. Please list all professional degrees, certifications, and licenses.
- b. Please provide details of your teaching and school/network/district leader experience, including locations, tenure, role, and success metrics.
- c. Of the following, please indicate your level of expertise on a scale of 1 to 5 (1=Novice, Advanced Beginner, Competent, Proficient, and 5=Expert):
 - i. Curricular materials and instructional strategies
 - ii. Positive school culture and whole child support practices
 - iii. Data analysis and data-informed instructional cycles
 - iv. Adult learning and professional development approaches, including
 - 1. Systems and school leader development
 - 2. Principal/school leader development, and
 - 3. Teacher development
 - v. Network systems development/management and managing priorities through leadership layers
 - vi. Family engagement strategies and community investment practices
- d. Please detail your experience developing or implementing multiyear strategic plans that enabled high-quality school outcomes, including your role, the focus areas for the strategic plan, the methods of data tracking, and achieved results.
- e. Please provide details of your professional coaching experience, including locations, tenure, role, coachees, and success metrics.
- f. Please describe your prior project and team management experiences.

C. Organization and Team Member Information:

- a. Please provide a brief biography (one to two paragraphs) for any team member or individual contributor who would complete work under this contract.
- b. Please describe your organizational structure (if there is more than one team member), including communication process, lines of reporting, and any special technology or tools used.
- c. Please share a brief statement indicating your availability over the next two years (until December 2025) to take on new projects. This might include how much

notice you would require to begin a scope of work, your openness to travel, and how many hours a week you are looking to work.

d. Please explain how you/your organization considers equity in your work.

D. Budget: *Please note that travel costs need not be included below. These incurred costs will be reimbursed to the Vendor at the point of invoicing.*

a. Please include a table that breaks down hourly costs, including individual team member time.

b. Please identify any specialized technology and tools you require to complete your work and their associated costs.

E. Attachments:

a. Please attach a recent résumé for any team member seeking to qualify under this RFQ.

b. Please attach annotated relevant work samples that speak to your ability to deliver on each of the key skills and experiences requested. Please indicate which skill or experience a given work sample is highlighting. One work sample may be sufficient for multiple skills and experiences, but the accompanying annotations (either inserted at relevant points throughout the document or attached as a narrative explanation) should clearly speak to evidence of excellence of each. Examples of work samples might include: (1) annual school/network professional development plan that you created, (2) specific professional development session (instructional or cultural) that you created and delivered, (3) work plan for a school/network priority/initiative that you created and led, (4) staff coaching scope and sequence or individual coaching agenda that you used with your team, and/or (5) a network/school/district strategic plan or stakeholder engagement plan that you led the development of.

c. Contact information for three (3) current or former colleagues or clients to provide references for your proposed services and a brief description of the scope of work you completed for each client.

d. Additional materials at your discretion.