



# Request for Proposal Guide

**Writing Effective Curriculum-  
Based Professional Learning RFPs**

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# Summary

It is easy to underestimate the power of requests for proposals (RFPs). The RFP process— from drafting to contracting— can feel overwhelming, bureaucratic, and unnecessarily cumbersome. Just getting an RFP out the door can feel like a win, but quality matters. When done well, RFPs are an important lever that education leaders can use to provide more effective support for teachers and to improve student outcomes.

We also know that adopting and implementing high-quality instructional materials (HQIM) can be a daunting task, and education leaders often benefit from partnering with one or more qualified organizations to help them navigate the complex change-management process. In many cases, identifying and contracting with a qualified organization requires LEAs and SEAs to engage in an RFP process.

Unfortunately, state and local education agencies (SEAs and LEAs) often struggle to write strong RFPs.

**A recent analysis of RFPs in the market conducted by Rivet Education uncovered that over 60 percent of the proposals released are not high-quality.**

# Summary

Poor-quality RFPs increase the likelihood of low-quality bids from unqualified vendors. Strong RFPs, on the other hand, are more likely to result in



High-Quality Vendor Pool



Effective Use of SEAs' and LEAs' Time and Money



Strong Results for Students and Teachers

Rivet Education's RFP Guide supports SEAs and LEAs in developing RFPs related to curriculum-based professional learning. This guide focuses on RFPs related to these services because research shows that providing educators with strong materials and curriculum-based professional learning is one of the most effective ways to improve the quality of teaching and learning in classrooms. This tool is designed to help. It includes:

## Characteristics of Effective Professional Learning RFPs

RFPs should reflect SEAs' and LEAs' specific needs and local contexts. However, there are many characteristics that strong RFPs related to curriculum-based professional learning share, regardless of context.<sup>3</sup>

<sup>2</sup> Steiner, D., Magee, J. & Jensen, B. (2018, November). *What We Teach Matters: How Quality Curriculum Improves Student Outcomes*. Learning First and Johns Hopkins Institute for Education Policy.

<sup>3</sup> Johns Hopkins Institute for Education Policy. (2020, June). *The Importance of District and State RFPs: Effective Professional Learning to Support High-Quality Curriculum Implementation*.

# Characteristics of Effective Professional Learning RFPs

- **Describe a clear vision** for instruction in classrooms across their system and how they see HQIM supporting that vision.
- **Clearly define the goals** the LEA/SEA is trying to achieve or the problem they are trying to solve through a contract with an outside professional learning organization.
- **Demand high-quality, effective professional learning** that is deeply connected to the specific HQIM educators use and reflects best practices for adult learning, such as coaching from experts, opportunities for collaboration, practice, feedback, and reflection.
- Set the expectation that professional learning should **address the needs of educators at every level of the system**, from teachers to school and district leaders.
- **Prioritize sustainability** by requiring providers to commit to building the LEA's/SEA's capacity to continue supporting teachers and leaders in their learning after the contract ends.

# Characteristics of Effective Professional Learning RFPs

- Contains clear and realistic information about
  - **Budget**, such as the total amount and how proposed budgets will be evaluated;
  - **Timeline** for when work and deliverables need to be completed;
  - **Educators served**, such as the number of teachers by content, school, and/or grade band and other roles served by the professional learning, such as coaches and/or school and district leaders, and the number in each role; and
  - **Limitations and requirements**, such as required formats, already planned dates for professional learning, or other LEA/SEA requirements that will impact the delivery of professional learning.
- **Prioritize the quality of professional learning** among the criteria used to evaluate proposals.

# Components of Effective Professional Learning RFPs

To increase the likelihood that RFPs reflect the characteristics above, LEAs and SEAs should consider including the following components in their RFPs. LEAs/SEAs may choose to reorder these components to meet their needs. Rivet has developed [guidance to support LEAs and SEAs in drafting this content, including descriptions and guiding questions](#).

- **Introduction:** Summary of the purpose of the RFP, including an abridged description of the services you aim to procure.
- **Background and Context:** Information relevant to the services you aim to procure, such as the demographics of your LEA/SEA, your academic vision, background on why you are procuring these services, and past or current initiatives and projects related to the scope of work described in your RFP.
- **Goals/outcomes:** Define what success will look like at the end of the project or completion of services and how vendors will be held accountable for the deliverables outlined in the scope of work.
- **Scope of Work:** A vague or poorly defined scope of work is one of the most common pitfalls of RFPs; it is also the one pitfall most likely to result in low-quality bids and an unsuccessful project. The scope of work should clearly describe the services and deliverables you expect to receive and how they will achieve the goals outlined in the previous section.
- **RFP Timeline:** Key dates and deadlines of the RFP process, such as the due date for proposals, the selection window, the date by which bidders will be notified, the predicted contracting window, and the date you expect the work to begin.

# Components of Effective Professional Learning RFPs

- **Required Qualifications:** Minimum qualifications that bidders must meet to be eligible to win the contract and that are required to ensure the project's or services' success.
- **Methodology for Evaluating and Scoring Proposals:** A simple rubric outlining the criteria for the success of the project, including:
  - Bidder's understanding of the project goals, scope of work, risks, and constraints;
  - Quality of bidder's approach and methodology of services/deliverables, including risk mitigation strategies;
  - Bidder's experience with projects similar in size, scope, technical requirements, and function to the proposed contract;
  - Staff qualifications and expertise in areas that are especially relevant to the scope of work (e.g., the science of reading);
  - Bidder's ability to meet cost and timeline requirements.
- **Submission Requirements:** Specific instructions for what bidders need to submit and how.
- **State or Local Requirements and Legal Notifications:** Standard legal language and requirements must be included in the RFP per state or local guidelines.



# 9 Steps of an Effective RFP Process

Follow the steps below to ensure the RFP process runs smoothly and efficiently, encourages multiple strong bids, and results in selecting the best vendor.

1

**Define RFP purpose and objectives.** Start by clearly and succinctly defining what you hope to accomplish through the project. What will be true by the end of it? What problem(s) are you trying to solve? Why is partnering with an outside vendor important to the project's success?

2

**Identify and invest stakeholders in the process.** The success of your RFP and project will likely depend on involving key stakeholders early and often. A stakeholder is anyone who can influence the success or failure of the project starting with drafting the RFP all the way through to the end of the project. This can include people responsible for doing work related to the project, people who have the authority to red or green light the project, people from whom you will need support or input, and people who may not directly influence the project but whose opinions and investments matter. The following is a non-exhaustive list of potential stakeholders and may include:

- Others on your team
- People on other teams in your LEA/SEA (e.g. those who run related initiatives)
- Educators impacted by the work (e.g. teachers, instructional coaches, directors of professional development, principals, etc.)
- State or local school boards

**3**

**Meet with your finance/procurement office.** Before sitting down to draft your RFP, meet with your finance and/or procurement team to make sure you understand any required documents (e.g., RFP templates), procedures (e.g., posting and review requirements), and policies (e.g., blackout periods). This is also a good opportunity to confirm the budget for the project.

**4**

**Write the RFP.** Use the characteristics of effective RFPs and the required forms from your finance/procurement team to draft your RFP. Guidance for drafting the RFP can be found in the appendix. Rivet has also created a template to help you draft the programmatic portions of your RFP. Make sure your timelines allow for iteration based on feedback from the stakeholders listed above.

**5**

**Release the RFP.** Many SEAs and LEAs have policies regarding where and how long RFPs must be posted. Work with your finance/procurement office to release the RFP per those requirements. Keep in mind that a very short application window may limit the quality and quantity of bids you receive.

6

**Plan for the review process.** Depending on your timeline, this step can be completed either before you release the RFP or while you wait for vendors to submit bids.

- Establish a review team of representatives from the stakeholder groups mentioned above.
- Create a project plan that outlines the timeline, methodology (e.g., voting or consensus model), and participants in the decision-making process.
- Train the selection committee on the rubric, the characteristics of effective RFPs, and the criteria of high-quality curriculum-based professional learning, and have them norm on what to expect to see in the responses for each component of the RFP.

7

**Review bidders' proposals and select your vendor(s).** Once the bid deadline has passed, the cross-functional review team can begin deciding which vendor(s) best meets the criteria and requirements outlined in the RFP.

8

**Notify and contract with the selected vendor(s).** Share the good news with the vendor(s) you selected and work with your finance/procurement team to engage in contract negotiations.

9

**Onboard your vendor(s).** After the contract is signed but before services begin, you should hold a kick-off meeting with your new professional learning partner to align the goals and objectives of your partnership. Check out Rivet's Professional Learning Partner Playbook for additional guidance on planning your vendor kick-off meeting.

# Looking for additional support?

Contact us for 1:1 support in crafting a clear, coherent, and quality RFP.

Rivet Education's mission is to transform education by empowering educators to use high-quality instructional materials (HQIM) effectively and equitably. We provide the guidance and tools needed to ensure that every teacher can deliver outstanding instruction, leading to improved student outcomes and limitless possibilities for all learners.



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# APPENDIX

## **Sample Contract Guidance for Writing Effective Curriculum-Based Professional Learning RFPs**

Use the descriptions and reflection questions to draft your RFP. Rivet Education strongly recommends meeting with your finance/procurement office members early in your drafting process to ensure you know any required forms, policies, procedures, and laws related to procurement.

### **RFP Guidance Components**

Introduction

Background and Context

Goals/Outcomes

Scope of Work

RFP Timeline

Scoring Methodology

Description of Minimum Provider Qualifications

Submission Instructions

State or Local Requirements and Legal Notifications

# Introduction

## Description

This brief (100–150 words) section should summarize the RFP’s purpose, including an abridged description of the services you aim to procure.

## Guiding Questions

- What is the primary purpose of your RFP?
- What type of products or services are you hoping to procure?

# Background and Context

## Description

This section provides potential bidders with the relevant background information and context for the products or services you aim to procure. Details about the size and composition of your LEA/SEA (e.g., number of teachers, students, and or schools), your vision for teaching and learning, where you are in your instructional materials journey (e.g., seeking to adopt new K–5 math materials, adopted new K–5 math materials last year and struggling with implementation), the problem you seek to solve, and past or current initiatives and projects that fall outside of but are closely related to the scope of work described in this RFP.

## Guiding Questions

- What do potential bidders need to know about your LEA/SEA to understand and contextualize the scope of work?
- What problem(s) are you trying to solve through this initiative/project?
- Are there relevant internal strengths and weaknesses and external opportunities and threats that bidders should know?
- What other initiatives or projects should bidders be aware of that influence this work?

# Goals/Outcomes

## Description

LEAs/SEAs can work with their selected vendor(s) to refine the goals or outcomes of the project during the contracting phase and throughout the project. However, clearly outlining your goals for the project in the RFP increases the likelihood of receiving proposals that fit your needs. It also provides a strong foundation for the project by communicating to vendors the outcomes for which they will be held accountable from the very beginning of your partnership. For example: “provide 100 1st-, 2nd-, and 3rd-grade teachers with a 3–5 day training that orients them to the approach and components of the CKLA curriculum and equips them to internalize and effectively plan for lessons in unit 1.”

## Guiding Questions

- At the end of the contract, what should be true for you to conclude that the partnership or project was successful?
- What are the measurable results or goals you will hold the contracted vendor(s) accountable for achieving?

# Scope of Work

## Description

The scope of work is often the meat of an RFP. It is your opportunity to define the services and deliverables you expect contractor(s) to provide and the timeline for doing so. Taking time to define what you want the selected contractor to do or produce and clearly communicating those expectations will increase the likelihood of attracting quality bids. It also pays to be forthcoming about where, if at all, you are open to suggestions from bidders on the path or approach they think is best to accomplish the goals/objectives you laid out above.

## Scope of Work (continued)

### Description

Although you will most likely work with the contractor(s) to create a detailed timeline for support, set preliminary expectations for the frequency and duration of the support and deliverables. Bidders will need to self-assess, and you will need to verify that they can meet these expectations.

Finally, if you have a specific format in mind (e.g., pre-determined in-person professional development days, ongoing coaching via PLCs, virtual sessions, etc.), state that here to focus and set clear expectations for your bidders.

There are four types of curriculum-based professional learning. Rivet has included more details about each below, which you are welcome to copy and paste without citation.

**Adoption PL:** Supports schools and school systems in developing and executing an adoption process to select an HQIM aligned with a vision for excellent, equitable instruction. **Effective Adoption CBPL:**

- Defines and communicates a vision for excellent, equitable instruction and understanding the role of HQIM in achieving that vision.
- Develops an adoption plan that includes clear goals, action steps, a timeline, stakeholder engagement, and communication plans that result in the selection and procurement of an HQIM aligned with the vision.
- Executes an adoption process with a clear process for reviewing, piloting, and selecting an HQIM emphasizing stakeholder engagement and alignment to vision.



## Scope of Work (continued)

**Initial Implementation PL:** Equips teachers and leaders with an initial understanding of the HQIM and prepares them to implement it skillfully from day one of instruction. Effective Initial Implementation CBPL:

- Develops a vision for strong implementation of the HQIM that connects back to the vision for instruction.
- Helps educators understand the HQIM's approach and design and how it supports the vision for instruction.
- Navigates publisher-specific logistical and technological considerations, such as the components of the materials, how they are organized, and how teachers and students access them.
- Supports teachers' internalization of first units and lessons through rehearsal with colleagues who teach the same content and HQIM.

**Ongoing Implementation Support for Teachers PL:** Deepens teachers' initial understanding of how to implement the HQIM by providing opportunities for teachers to reflect on their implementation and plan for upcoming instruction.

Effective Ongoing Support for Teachers CBPL:

- Reinforces the vision for strong implementation of the HQIM that connects back to the vision for instruction.
- Supports teachers' internalization by rehearsing units and lessons with colleagues, focusing on anticipating student thinking and responses.
- Supports educators in adapting the HQIM to meet the needs of all students and providing rigorous, grade-level instruction.
- Supports teachers in reflecting on and analyzing student data, especially student work from the HQIM, to address the diverse needs of students through the use of HQIM-embedded supports.

## Scope of Work (continued)

**Ongoing Implementation Support for Leaders PL:** Supports school and school system leaders in identifying and implementing the enabling conditions and resources required to implement the HQIM successfully. Effective Ongoing Implementation Support for Leaders CBPL:

- Communicates a vision for strong implementation of the HQIM that connects back to the vision for instruction.
- Supports leaders with allocating the essential time (e.g., class time, PLCs) and resources (e.g., trade books) needed for HQIM implementation.
- Empowers leaders to build coherence by eliminating policies and procedures that impede strong implementation.
- Supports leaders with monitoring and identifying trends within student learning and teacher practice.

### Guiding Questions

- What type of services are you seeking to procure?
- Who is the audience for those services?
- What deliverables do you expect the contracted vendor(s) to produce?
- In what places, if any, are you open to bidders proposing a path or approach they think is best to accomplish the goals/objectives of the project?
- What is the intended timeline and duration of services?
- What is the desired format of the service (e.g., virtual, in-person)?
- What are logistical considerations that contracted vendor(s) must be prepared to meet? (e.g., do they need to provide lunch for participants?)

# RFP Timeline

## Description

Include major milestones in the RFP timeline.

## Guiding Questions

- What are the major milestones in the RFP process?
- Is there an opportunity for bidders to ask questions before the proposal due date? If so, when and how will answers be shared?
- When are submissions due?
- When do you expect to select the winning bidder(s)?
- When do you expect the contracting process to begin and end?
- When do you expect work to begin?

# Scoring Methodology

## Description

Develop a simple rubric – ideally in conjunction with your review committee – that communicates the criteria that matter most to the success of the project. Though there are many criteria you can include, Rivet recommends that the content of your rubric and scoring methodology communicates to bidders that the quality of their proposed PL services/deliverables is most important.

# Scoring Methodology (continued)

Rubric components might include:

- **Bidder's understanding of the project** goals, scope of work, risks, and constraints;
- **Quality of bidder's services/deliverables**, including risk mitigation strategies:
  - **Content-focused and HQIM-aligned:** Deepens educators' understanding of what to teach and how to teach it within the context of teachers' instructional materials.
  - **Specific to educators' context:** It is customized to educators' roles, subject areas, grade level/bands, and skill levels.
  - **Equity-focused:** Supports teachers effectively engage all students through rigorous tasks, including students with unfinished learning, students learning English, and students with special needs.
  - **Data-driven:** Grounded in evidence of student learning where educators have opportunities to examine student work from the curriculum.
  - **Addresses expectations and motivations:** Attends to teacher motivation, mindset, and implicit bias; involves courageous conversations that challenge negative assumptions about what students are capable of.
  - **Interactive and collaborative:** Involves expert models and practice, where educators can participate in lessons as students, and plan, internalize, rehearse, and reflect on the lesson with colleagues who teach the same content and curriculum.
- **Bidder's experience** with projects similar in size, scope, technical requirements, and function to the proposed contract;
- **Staff qualifications and expertise** in areas that are especially relevant to the scope of work (e.g., science of reading);
- Bidder's ability to meet **cost and timeline** requirements.

# Scoring Methodology (continued)

## Guiding Questions

- What knowledge, skills, and experience should the contracted vendor(s) have for the project to be successful?
- What characteristics have previous vendors possessed that led to success? What deficits have led to challenges?
- How will you score the proposals?

# Description of Minimum Provider Qualifications

## Description

Describe the minimum qualifications that bidders must meet to be eligible to win the contract. These should align with the criteria in your rubric. For example, you might require that bidders have worked on at least three projects similar in size, scope, technical requirements, and function to the proposed contract and that their staff have demonstrated expertise in the science of reading.

## Guiding Questions

- What type of experience must the contracted vendor(s) have?
- What type of expertise must they demonstrate?
- What qualifications must the staff/facilitators working directly with your educators have?

# Submission Instructions

## Description

This section tells your bidders what they need to submit to score well on the RFP rubric and give you confidence that they can accomplish the scope of work. Rivet has included some suggested items below, but work with your finance/procurement office to determine the full list of required components and how bidders must submit them. Consider including a page limit to encourage succinctness.

- A summary of the bidder's understanding of the scope of work and potential risks and constraints;
- A description of how the bidder plans to achieve the goals outlined in the RFP, including how they will meet timelines, mitigate risks, track progress, and measure results;
- Sample materials (e.g., presentation slides with facilitator notes, classroom observation tools) that illuminate the approach they plan to take to meet the goals outlined in the RFP and provide evidence that they have the expertise to do so;
- A summary of the company's background, including their expertise in key areas (e.g., phonics instruction) and past projects they've worked on that are similar in size, scope, technical requirements, and function to the proposed contract;
- Résumés of key staff who will be involved in the project;
- A deliverables-based budget.

## Guiding Questions

- What is mandatory for bidders to submit? What is optional?
- In what format?
- To whom?
- Is there a page limit?
- Whom should bidders contact if they have questions?

# State or Local Requirements and Legal Notifications

## Description

Most LEAs and SEAs have standard legal language and requirements that must be included in RFPs. Meet with your finance/procurement office team early in your drafting process to determine additional information that must be included in your RFP.



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