BRANCHING MINDS

The MTSS Request-for-Proposals Guide

Introduction

So you need to go to RFP?! You're in the right place - I've been there and know what a challenge it can be.

But the RFP process is also an incredible opportunity to connect with the educators who will be using the software day-to-day. You can build buy-in for MTSS and select a solution that is truly tailored to your district's needs.

This RFP guide will help you navigate step-by-step. It is the perfect companion to the MTSS Buyer's Guide, another resource to help you and your team evaluate solutions fairly and competitively. You will still have questions, so don't hesitate to reach out. The team at Branching Minds is ready to help you make your MTSS vision a reality!

Julie Miller-Johnson
Associate Director of Funding and Proposals
Branching Minds

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What is an RFP?

A "Request for Proposals" is a formal competitive process that helps a school district evaluate potential vendors and determine the best fit.

A Request for Proposals (RFP) is both a document and a process.

RFP Document: The document outlines requirements issued by your district purchasing department or board of education. It invites vendors to submit proposals that meet your specifications. As the lead stakeholder in this process, the RFP document you create will help you get proposals that are easy to compare based on the features that matter most to your district.

RFP Process: The process includes everything from issuing the RFP to evaluating proposals to getting board approval for the final choice.

The more precise your RFP document, the clearer the proposals will be, and the easier it will be to see your top choice.

If you don't have a copy of the MTSS Buyer's Guide, grab one now! It contains an MTSS Platform Workbook that helps determine which features are most important to your district. This will help you write an accurate, comprehensive Scope of Work.

Dictating the structure and order of the proposal responses also allows an apples-to-apples comparison. Ultimately, you want the RFP document to result in a very clean process that helps you get the best solution for your needs and to sail through the consent agenda of any board meeting.

An RFP typically contains the following requirements:

☑ District information and Profile

☑ Project Background

☑ Procurement Policies/ Term of Contract

☑ Solicitation Schedule

☑ Company Experience

☑ References

☑ Scope of Work

☑ Pricing

☑ Evaluation Matrix

RECOMMENDED RESOURCES

🔗 The MTSS Platform Buyer's Guide

🔗 Editable Sheet: MTSS Platform Workbook

District Information/Profile

Provide the district profile or characteristics that frame the work in your district. It typically includes the district size (by enrollment and/or buildings and staff), the demographic profile of your district, and perhaps the district mission or key elements from the district strategic plan that may outline the district's approach to student outcomes. Your purchasing department may have a standard text for this element. This section can also include details about the platforms, SSO, SIS, and assessments in use across the district that may be relevant to the vendor's solution.

Project Background

Provide the district profile or characteristics that frame the work in your district. It typically includes the district size (by enrollment and/or buildings and staff), the demographic profile of your district, and perhaps the district mission or key elements from the district strategic plan that may outline the district's approach to student outcomes.

RECOMMENDED RESOURCE
📎 MTSS Stakeholder Survey

Procurement Policy/District T&C/Required Forms

This section is likely standard for your business office/purchasing department. It typically includes standard contract language (terms and conditions), the length of the contract and any renewal periods, and required forms such as the W-9, insurance, and any federal contracting forms if using federal funds.
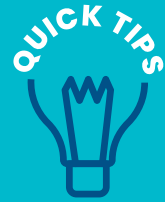
Creating a Solicitation Schedule

A good schedule keeps you on track and not only conveys to vendors the steps of the process but also that you have a realistic idea of what is involved in the process. Work backward from when you want to begin implementation, taking into consideration the necessity of board approvals and existing board meeting dates and the amount of time you will need to assess the proposals adequately. You'll need to bring your stakeholders into the process, so plan time to create a short list of top solutions and schedule presentations or Q&A with the top vendors.

QUICK TIPS

Don't forget to factor in holidays, school breaks, or any time your staff will be unavailable, such as testing windows or in-service days.

Suggested milestones

- **RFP questions due date**
- **RFP Q&A Published**
- **RFP due date**
- **RFP evaluation (1wk to 1 mo)**
- **Shortlist date (if any)**
- **Presentation date (if any)**
- **Finalist notified (if allowed)**
- **Board approval date (if required)**
- **Implementation start (date range)**

If you want to signal to potential vendors that you already have a preferred provider, publishing a short evaluation window may discourage some vendors from responding, thus decreasing the volume of proposals to evaluate.

Dictate the structure of RFP responses so that you can easily compare and evaluate. Consider the reading experience when you have the responses in hand and the evaluation process. For example, do you want to know about the company before you know about the product, or do you want to know about the product's capabilities before knowing the company's experience? Will you have evaluation teams assigned to sections of the RFP, or will they review each proposal entirely? Do you want evaluators to factor pricing in their initial evaluation or only after you have eliminated unqualified responses?

RFP Formatting Tips

Print vs electronic responses

Many RFP processes require vendors to submit hard copies with tab dividers in binders and/or electronic files such as flash drives or email attachments. Print responses cost vendors hundreds of dollars in color copies and shipping costs; however, if your stakeholders prefer print, ask for it. If you know your evaluation team will be reading on their laptops at home, shared email copies or flash drives are more economical and quicker to produce.

Page limits

If you want to read succinct RFPs, create a narrative page limit. If you want to know everything a vendor's product can do for you, don't. If you establish a page limit, be very specific about your expectations and be reasonable – vendors will shrink font sizes and margins to squeeze in as much information as possible! Too stingy a page limit can deny you enough information to comprehend the full scope of a vendor's capability.

Company Profile/Background

Consider what about the vendor matters to your district and your MTSS needs, such as the vendor's business structure, size, and location. Is it a young company, or has it been around long enough to demonstrate stability? Is it big enough to support a complex platform but small enough to deliver personalized service? Maybe you want to know something about the company that will help contextualize the product – how it started or the background of the company leadership.

Company Experience

This section will require a company to demonstrate that they understand your needs as a school district. Does the vendor have experience delivering your scope of work with other districts? How much experience? How can the company demonstrate the expertise to meet the requirements and supply the support and empathy needed to work with leaders, data teams, and teachers in your District? Ask about the company's technical experience and any product certifications and third-party endorsements the product may have.

References

One way to demonstrate experience is through references. Ask for references from similar-sized districts or with similar demographics and for some context. Designate someone on your selection team to contact the references. Have 2-3 standard questions that might help you tease out the contact's experience with the vendor and their product and services.

Technology Requirements

It is imperative that the solution you select works seamlessly within your district's technology environment (Student Information System, Single Sign-On, and assessment platforms) and meets the District's data privacy and security standards. If not identified in the background section, indicate the existing SIS or other platforms with which the final solution must interoperate. Check with your technology team to ensure their criteria for cloud-based platforms are included in the RFP.

Data Security

A vendor's ability to protect personally identifiable data (PII) and support your district's data privacy and security requirements is a pass/fail requirement; your district's data privacy team likely has a list of minimum protections to have in place. You want to ask for detailed information about the vendor's data security policies and procedures to be confident your district data is handled according to industry standards. Details are included in the Sample Scope of Work below.

Scope of Work

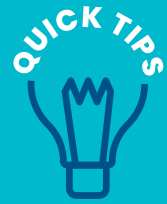**The Scope of Work is the list of specifications you require of the product.**

If you have completed the MTSS survey and [MTSS feature comparison](#), you will already know what features you want to request. The items highlighted in this section should align with the project background/ problem statement. You may be looking for specific features from vendors – which you can list, but you're also looking for an understanding of how cohesively the features work to meet the deliverable. By listing your platform expectations clearly in the scope of work, you demonstrate you are an informed consumer, and the RFP process will help curate the most qualified vendors.

How does the platform:

➜ Manage and ingest data?

➜ Help users to see and understand data?

➜ Support teachers to take action with the data?

➜ Support family communication?

➜ Foster collaboration and transparency among users?

➜ Save teachers time?

➜ Screen for behavior and SEL competencies?

➜ Display holistic student data

➜ Provide and Early Warning System and action steps?

In addition, consider the following:

➜ How is the solution evidence-based?

➜ What standard reporting capabilities are a high priority?

➜ What is on the vendor's product roadmap?

➜ What kind of support is provided throughout the life of your contract?

➜ How is on-demand support provided?

Professional Development

Vital to the success of any MTSS platform, professional learning is an often overlooked MTSS platform RFP requirement. Professional learning can range from platform/technology training to MTSS practice professional development to executive coaching.

Consider if you want to use a train-the-trainer approach, how ready your team is to implement MTSS practices, and who would benefit from MTSS practice support. Ask for enough detail to allow your selection committee to understand the difference between vendor PD offerings: for example,

- What types of professional learning are available for leaders vs. teachers

- When is professional learning offered?

- What time commitment is necessary for professional learning sessions?

- What resources are available throughout the year?

Customer Support

Ongoing support throughout the year is essential to your district's ability to sustain the MTSS practices and data platform well into the future. Consider what kind of support your teachers and leaders will most likely use and what will help with a smooth transition to the selected solution. Ask what the vendor's customer support includes and how much it costs.

Implementation Plan

If you want a clear picture of how long it will take from contract signing to teachers using the program, you'll want to ask for a detailed implementation plan. You'll want to know how long it takes to get the data ingested, how quickly the platform is up and running, and when and how MTSS support is provided throughout the year.

Pricing

Vendors often use different cost models, leaving the district with figures that make comparison difficult. You'll need to ask for detailed pricing to discern differences in total cost. For example, ask for what and how many data ingestions are included, the level of technical and customer support included, and the duration of that support. **We recommend asking for product and professional learning costs separately.**

Evaluation Matrix

Once you've reviewed the RFP responses, you'll want a method to choose one over the other. A simple rubric will support an equitable and unbiased review and keep you focused on your needs vs the nice-to-have. The part of the RFP that is the most important driver of the outcome should get the highest points – things like the scope of work requirements or support and professional learning.

Sample Matrix:

Criteria	Weight
Extent to which the proposed solution meets the requirements identified in the Scope of Work and the methodology to perform services outlined in the Scope of Work.	45%
Qualifications and experience (experience, references, company background)	20%
Strength of overall proposal (quality of response, the district needs are reflected in product offerings, depth of understanding of MTSS)	20%
Cost	15%

Make your MTSS Vision a Reality with Branching Minds

About Branching Minds

Branching Minds is a comprehensive MTSS solution with a full suite of teacher and administrator tools to support academic success and student wellness:

➡ Easily ingest screening and assessment data

➡ Automatically update student tier levels of need using consistent cut points.

➡ Create and monitor student academic and behavior intervention plans.

➡ Determine where a system-level response is needed.

With Branching Minds, educators have easy access to their students' assessment data, along with collaboration and intervention tools to help them take action.

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Branching Minds is not just a platform. It's a whole team of professionals and educators, people who understand education, who will help you create an MTSS that works. It's about best practice. It's about all the knowledge you gain from working with them, and all the professional development they provide. It helps you in every facet of the implementation, not just where to store your data.

**- Laurie Gregory, Director of Educational Services
Eden Central School District, NY**

Make your MTSS vision
a reality.

Request a personalized demo today!

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