

Sourcing Event 0000007467

Questions and Answers

Kindergarten to College Program Evaluation Partner RFP

Q&A Posted 10/21/2022

	Question	Answer
1	We interpret this to be a contract for 50K per year for 5 years with an extension up to 3 years beyond that for 50K/year, so 250K base plus 150K option contract value. It is not clear what is expected regarding the “qualitative impact phase” and the timeline for a 5-year contract doesn’t really fit with the notion that there would be three distinct phases (quant impact, qual impact and process evaluation). It would seem to us, unless we are being asked to follow students over time and reporting each year, it should be 2-3 year contract, not a 5 year contract.	<p>The duration allowable under the contract (without extension) is 5 years maximum, which is a standard time period for City contracts. The time period for performing the work does not have to cover a 5-year period. The timeline is proposed by the Bidder and based on their assessment of how long this scope of work will take. The Bidder may outline a research proposal that is 2-3 years in duration to complete all phases.</p> <p>The funding of \$250,000 does not need to be split up equitably between the years or between the phases.</p> <p>The Bidder should specify the length of each phase and the cost of each phase in their proposal.</p>
2	Could the amount per year be raised to \$100K, this is what we think would be needed to make it possible.?	See #1.
3	Can the contract be structured as a fixed price agreement with quarterly installments?	No. TTX typically requires a payment structure based on completed milestones and/or hours worked. We are open to discussing the payment structure with the winning Bidder during contract negotiations, but will likely require a structure that is at least partially based on meeting project milestones.
4	Please clarify what bidders should propose for Phase C. The second paragraph on page 3 of Attachment 1 – Scope of Work, includes Phase C as a scope of work. However, bullet point 1.d that follows on page 3 states “Note: Phase C will not be implemented by the proposer under this contract.” Please confirm that bidders must include technical and price proposals to develop the Phase C. Blueprint for Future Evaluation.	The final deliverable for Phase C is a blueprint for research. The note cited in this question clarifies that it is only the blueprint for future research and that this contract does not include the Contractor conducting and/or completing any of the proposed research that they recommend in the blueprint. In their proposal, Bidders should provide a high-level summary of their approach to developing this blueprint and the timeline needed to develop the blueprint.

5	Is this solicitation for an Indefinite Quantity, As-Needed contract? Or is it for a non-Indefinite Quantity contract to conduct the evaluation? While the RFP states in Section D that it is for an Indefinite Quantity contract, the contract type is unclear from reading the appendices and attachments included with the solicitation.	This solicitation is for Evaluation Services of the K2C Program. The services requested are outlined in Attachment 1, Scope of Work. The contract type will be Appendix A, City's Contract Terms. Section I. D. of the RFP are standard City terms for any solicitation/contract that is not for a specific quantity (ex. 20 pencils).
6	If this solicitation is for an Indefinite Quantity contract, is the Not-To-Exceed value of \$250,000 for each As-Needed contract during the initial term? (For example, if there are ten As-Needed contracts during the initial term, the total Not-To-Exceed value is \$2.5M.)	There will only be one contract awarded for this solicitation. The contract amount is Not-To-Exceed \$250,000 during the contract term. This amount should cover all phases of work. Should the City exercise its option to extend the contract beyond the initial term, City may also elect to increase the NTE proportionally.
7	What is the period of performance for each phase of the evaluation? The solicitation states in section B that the initial term is for five years, but the scope of work in Attachment 1 doesn't indicate the timing for each phase.	See #1.
8	When will bidders have the opportunity to submit requested revisions to the city's contract terms and conditions? The RFP states redlines will be requested within ten days of the notice of intent to award, page 2. But page 9 of the RFP states, "The submittal of a response to this solicitation shall explicitly stipulate acceptance by proposers of the terms found in this solicitation, any and all addenda issued to this solicitation, and the proposed contract terms."	Redlines will be requested within 10 days of the Notice of Intent to Award.
9	Postsecondary information - How does TTX/City track where students go after completing/exiting high school? Attachment 1 states "Student data, including academic performance, graduation status, college enrollment, and low-income households, is currently in the process of acquisition from SFUSD and is anticipated to be available in the Summer of 2023." Where do the college enrollment information come from and what information is included in it?	K2C receives enrollment data each semester from SFUSD with grade level, school, demographic and contact information. Recently, the reports have also noted whether the seniors listed are on track to graduate high school. We are in the process of securing more robust data from SFUSD, such as learning about college enrollment, the type of institution, and proposed area of study, and will engage our evaluation Contractor on these requests. Additionally, as part of our funds disbursement form, we are requesting information directly from graduating seniors regarding their post-secondary education plans. These details will be made available to our Contractor as well.

10	<p>Labor market – Is any labor market information available? For instance, on parents’ income or employment status? Or on students that move directly into the labor market after high school?</p>	<p>This information is not currently available directly to K2C. There may be relevant aggregated data published publicly. For example, SFUSD’s Research, Planning and Assessment Department shares data regularly including: SFUSD Public Data Dashboard: 2021-22 Tableau Public. Once our Contractor is engaged, we are open to including this in the data request we are working on with SFUSD.</p>
11	<p>Low-income households - Could you elaborate on what information is available for low-income households? Is it income, free and reduced price lunch, or some other piece of information?</p>	<p>SFUSD has provided data to K2C in the past related to the eligibility of our participants for free and reduced lunch (FRL). Pre-covid estimates suggest 60% of families in the district may be eligible for FRL. We do not receive FRL or income level data currently from SFUSD and K2C as a program does not ask participants directly for this.</p>
12	<p>Do families have to register? – What were the eligibility and selection criteria for inclusion into the K2C program? Is any student enrolled in SFUSD eligible? Or do they have to have entered the district in Kindergarten, for instance, or before 6th grade, for instance? How did the K2C program treat late joiners, such as those families who enrolled in Kindergarten after the start of the school year, such as entering SFUSD in January? Have the criteria changed over-time? Are students that joined SFUSD later, such as in 12th grade, eligible for K2C?</p>	<p>No, families do not have to register. The program is universal. K2C accounts are opened for every student, regardless of grade level, automatically when they join SFUSD. K2C currently covers grades K – 12. When K2C started, it was initially offered to a select cohort of Kindergarteners, but in subsequent years has been extended to every student in the District. Families have the ability to opt out of their account if they wish. Families who register to view their account online may access additional public incentives for completing this task and engaging with their accounts. Additional details are available at www.k2csf.org.</p>
13	<p>Eligibility vs registration – Even if all families in SFUSD are eligible, there is a difference between eligibility and registration. For one statewide CSA program, for instance, all families are eligible. But in order to claim the initial deposit set aside by the state, families have to register their child for the program before they turn 18. So we’re wondering how it works specifically with K2C.</p>	<p>See # 12.</p>
14	<p>Qualitative data - Can the City please describe the qualitative data that already exists? What studies has TTX/City conducted historically to understand the use of the accounts and families’ experiences with them?</p>	<p>K2C has periodically conducted focus groups, gathered testimonials, and organized contests for students and families throughout the life of the program. K2C has also published reports on specific aspects of the program, including the Equity Incentive (Focus on the Future Treasurer & Tax Collector (sftreasurer.org)) and savings behaviors during COVID (Saving for College During COVID-19 Office of</p>

		<p>Financial Empowerment (sfgov.org)). With support from behavioral design firm Ideas42, K2C recently conducted program-wide outreach as part of a pilot text-message-based intervention to help participants overcome the barrier of making an initial deposit. The K2C team can work with the Contractor to share the findings of historic efforts.</p>
15	<p>Which samples would we be able to access – What support is available from TTX/City to identify K2C program participants? Page 2 of Attachment 1 describes the existing data that TTX/City can furnish, but is it safe to assume these data are on K2C program participants and that they can be used to identify and contact said program participants? Attachment 1 states that phone and email contact information will be made available from SFUSD. If not, will TTX/City provide identifying information or contact information of program participants? How will it do so?</p>	<p>Yes, the Contractor will be able to use the contact information for K2C participants to contact them, including name, address, phone, and email for parent(s)/guardian(s), as well as the household's preferred language. To help inform outreach strategies, K2C may also share data about the success of emails or text messages from our past communications. Currently, K2C does not receive student's SFUSD assigned email address or their personal cell phone.</p>
16	<p>Account contributions – Do families contribute to their students CSA accounts? Or is it to a separate account, like a 529? For instance, ScholarShare529? If a 529, who runs the 529 accounts – who is the administrator of record? If not a 529, which financial institution or institutions are the accounts housed at? Attachment 1 states that K2C records include “Balances moved to a 529.” We’re wondering how this information is tracked, which 529 program or multiple 529 programs, and, as mentioned above, the program administrator?</p>	<p>Families may contribute directly to their K2C accounts, which are deposit only savings accounts where the publicly funded seed and participant contributions are pooled. Accounts are held with Citibank.</p> <p>In some instances, such as if a student leaves SFUSD prior to graduating from 12th grade, a family may opt to transfer their funds from their K2C account into CA’s 529 ScholarShare program. If families transfer their balances to CA 529 Scholar Share program, our program retains financial data on the amount transferred, but does not currently have visibility into subsequent account activity or the balance of funds once they are held with ScholarShare.</p> <p>For more details on allowable transfers, please review K2C program rules available at www.k2csf.org.</p>
17	<p>Financial institution – Attachment 1 states the accounts are currently with Citibank. Is that still the case? There was a separate recent RFP for “Kindergarten to College Financial Institution Partner” earlier this year that is now closed. What was the result of that RFP? In other words, is the financial institution switching from or to Citibank? If it is Citibank that</p>	<p>Citibank is the current financial institution partner for this program and has been issued a Notice of Intent to Award the upcoming contract.</p>

	was awarded the contract from the RFP, what was the old financial partner?	
18	Data from financial institution – How will data from the financial institution be shared? Is it linkable to SFUSD administrative data / student records? Can we link accounts to specific students and their SFUSD state achievement test scores, for instance?	Financial institution data will be shared securely in Excel format. The means to cross reference financial institution and SFUSD administrative data will be provided to the Contractor, either by de-identified key or via student ID.
19	Incentives – Is it possible to receive a detailed list containing the timing, dollar amount, and eligibility criteria (including student cohorts eligible) of the additional incentives that have been offered to K2C families?	Current K2C incentives are outlined on the program website at: https://sfgov.org/ofe/your-k2c-account We can also summarize past incentives and scholarship awards offered historically since these have tended to change year to year with available funding and strategy.
20	Program Operation information - What information will be made available from Program Operations? For instance, resources/budget spending, staffing, school visits, other operation information.	The program team will work closely with the Contractor to fulfill information and provide insights to best inform analysis of program operations. This may include but is not limited to budget information, staffing structure, program communication activity, high-level community engagement reports, and other information as requested and readily available.
21	Additional demographic information - The RFP discusses a particular emphasis on” BIPOC and other historically under-represented populations in post-secondary education.” Is there additional demographic information available, including but not limited to parental education and family type/marital status?	K2C does not receive parental education status or marital status from SFUSD.
22	For Phase A1, are you open to the research team collecting quantitative data (e.g., survey data), or do you hope to see the evaluators rely entirely on administrative data?	We are open to the Bidder’s proposed methodology for Phase A1.
23	We note the instruction that “Phases A1 and A2 should be designed to occur sequentially” and put forth the following questions: a. We take this to mean that Phase A1 must be complete before data collection for Phase A2 begins. Is this correct, or is the team open to approaches in which the two phases overlap (e.g., a longitudinal, mixed methods design in which quantitative survey data and qualitative interview data are both collected at intervals over a multi-year period)?	We are open to approaches in which the two phases overlap. The intent of sequencing Phase A1 prior to A2 is to expedite some initial deliverables and analysis from A1, given that the program’s quantitative and administrative data is more readily available.

	b. If the stated goal of having discrete, sequential components for Phases A1 and A2 is indeed a requirement, how much time should be allocated to each phase within the five-year period?	
24	Will you be able to provide data on which 2022 graduates were enrolled in the K2C pilot?	Yes, K2C can furnish data on the small group of students who graduated in 2022 and their engagement with the K2C program and disbursement of funds.
25	For the research question “Does the program have an impact on the academic achievement and educational attainment of participants?” are you interested in academic achievement in high school or postsecondary education, or both?	Both. If collection of academic achievement data for postsecondary education does not fit into the Bidder’s proposed timeframe of Phases A1 – A2, we welcome the incorporation of this data into the blueprint developed for Phase C.
26	Are the “student data” on academic performance, graduation status, college enrollment, and income level (mentioned on page 2 of Attachment 1) going to be provided at the individual student level or aggregated to some higher level? a. Could you please confirm whether the other administrative data (e.g., demographic, financial, and program data) will be provided at the individual level as well?	There may be relevant aggregated data reported to the State of California or made publicly available by SFUSD: SFUSD Public Data Dashboard: 2021-22 Tableau Public . Once our Contractor is engaged, we are open to including additional data requests as we are working with SFUSD. Regarding the available data referenced in the RFP (Demographic, Financial, Program), this is available at an individual level.
27	For which years of graduating students and which grade levels will the “student data” be available (e.g., cohorts of students prior to K2C; the K2C pilot cohort; and the universal K2C cohorts)?	K2C will seek “student data” from SFUSD for the graduating students that are part of the K2C program, graduating Class of 2023 and all subsequent years. For cohorts of students prior to K2C, this data is published in aggregate by the State of California.
28	We are aware that K2C has continuously altered and improved its incentive programs, including introducing an innovative school-based progressive incentive program (e.g., providing higher incentives to students in 9 historically underserved schools). We have two questions related to incentives: a. Will any students in high school during the study period have benefitted from the school-based progressive incentive programs? b. Will the program provide data on the different kinds of incentive programs to which students had access?	The incentives offered by K2C have evolved over time. K2C participants who will graduate during the course of the program evaluation will have had access to a variety of incentives. K2C can provide data on incentives over the life of the program. Regarding the school-based progression incentive program noted in this question, the Equity Incentive program: One grade level of students who participated in the Equity Incentive program will reach high school during the study period. They are currently elementary school students, Grades 1-4, so the pilot year will reach 9 th Grade by contract year 5.

29	On what time frame are the administrative and student data reported (e.g., yearly, quarterly)?	Enrollment data is provided two times per year, in Fall and Spring. The intervals of other administrative and student data vary depending on the data set, with most being available annually. Financial data can be made available more regularly by K2C program team.
30	How often has the demographic information (e.g., grade level, school, contact information) been updated, if at all?	Enrollment data is updated two times per year.
31	Has the K2C program or school district collected any other data (not mentioned in the RFP documents) that may be used in this evaluation, such as students' educational expectations or how students pay for postsecondary education?	See #14. Additional data collection that has been completed by SFUSD independent of the K2C program that may be relevant for this evaluation is available through SFUSD's Research, Planning, and Assessment Department for review: Research, Planning and Assessment Department SFUSD.
32	Could you please provide guidelines on the City's maximum allowable overhead rate (or preferred range)?	There are no City restrictions imposed on a maximum allowable overhead rate for this contract. If the overhead costs are not baked into the calculation of the Bidder's hourly rate and are included as a separate line item in the proposed budget, we request that costs encompassed in the overhead rate be sufficiently detailed in the budget narrative provided by the Bidder.