



**Solicitation Information
February 19, 2016**

RFP# 7550320

Consultant to Develop a Comprehensive Enrollment and Marketing Plan for Henry Barnard School

Submission Deadline: March 21, 2016 at 2:00 PM (ET)

PRE-BID/ PROPOSAL CONFERENCE: NO

DATE: N/A

LOCATION: N/A

Questions concerning this solicitation must be received by the Division of Purchases at gail.walsh@purchasing.ri.gov no later than **Thursday, March 3, 2016 at 5:00 PM (ET)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: NO

BOND REQUIRED: NO

GAIL WALSH
CHIEF BUYER

Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov

Note to Applicants:

Offers received without the entire completed four-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

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SECTION 1: INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the Henry Barnard School and Rhode Island College, is soliciting proposals to retain a qualified and committed strategic planning consultant to help facilitate and create a successful comprehensive enrollment and marketing plan for Henry Barnard School.

Since 1898, Henry Barnard School has served Rhode Island College and the people of Rhode Island as a non-public, independent, elementary school. Our learners, most of whom live in the greater Providence metro area, range in age from pre-school through grade five. Henry Barnard School is a component department of Rhode Island College's Feinstein School of Education and Human Development. It is located in the heart of the college campus in Providence, RI.

This request for proposals is in accordance with the terms of the State's General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases Home Page by Internet at www.purchasing.ri.gov. This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

1. Potential vendors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the vendor. The State assumes no responsibility for these costs.
4. Proposals are considered to be irrevocable for a period of not less than 120 days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.
6. Proposals misdirected to other state locations, or which are otherwise not present in the Division at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the Division.

7. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered. Subcontracts are permitted, provided that their use is clearly indicated in the vendor's proposal and the subcontractor(s) to be used is identified in the proposal.
8. All proposals should include the vendor's FEIN or Social Security number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.
9. The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.
10. Vendors are advised that all materials submitted to the State for consideration in response to this RFP will be considered to be Public Records as defined in Title 38, Chapter 2 of the General Laws of Rhode Island, without exception, and will be released for inspection immediately upon request once an award has been made.
11. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
12. Equal Employment Opportunity (G.L. 1956 § 28-5.1-1, et seq.) – § 28-5.1-1 Declaration of policy – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies to all areas where State dollars are spent, in employment, public services, grants and financial assistance, and in state licensing and regulation. For further information, please contact the EEO Administrator at (401) 222-3090 or Raymond.lambert@doa.ri.gov.
13. In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). This is a requirement only of the successful vendor(s).
14. The vendor should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information visit the website at www.mbe.ri.gov or contact the MBE Administrator at (401) 574-8670 or Dorinda.keene@doa.ri.gov.

SECTION 2: BACKGROUND

Henry Barnard School is a unique and independent non-public school, which intersects high quality learning, friendships, and remarkable personal growth. The mission of the Henry Barnard School is to provide joyful, exceptional, educational experience that empowers each child to become a confident, accomplished and innovative learner. Please visit <http://henrybarnardschool.org/> for more information about the school.

The school's current enrollment is 238 students and has an annual operating budget of \$3.8 million. The school's operating budget is a component of Rhode Island College's general education budget, which is reviewed and approved by the Rhode Island Council on Postsecondary Education, Rhode Island Board of Education, and the Rhode Island General Assembly.

The consultant will be engaged primarily with the Principal at Henry Barnard School with guidance and assistance from senior leadership at Rhode Island College.

The initial contract period will begin approximately April 1, 2016 and will last for six (6) months from the beginning date of the contract. Rhode Island College reserves the right to extend or alter the contract after the initial six (6) month period based on vendor performance and/or the availability of funding at Rhode Island College. The consultant will invoice Henry Barnard School on a monthly basis with an itemized list of billable hours and hourly rate for work performed. The consultant must document all billable hours so that the school can see what work is being performed before remitting payment.

SECTION 3: SCOPE OF WORK

General Scope of Work

Currently, Henry Barnard School faces several fiscal challenges and the services of a consultant are needed to develop a comprehensive 5-year enrollment and marketing plan to address the following areas:

- Enrollment management and enrollment growth
- Marketing and the design of recruiting and retention programs
- Financial and tuition-rate analysis
- Development of scholarship fund(s)

The comprehensive enrollment and marketing plan should take into consideration the limited available resources at Henry Barnard School and Rhode Island College when developing the strategic plan. The plan should be a complete turn-key solution and should include all known, expected, proposed, or optional costs of executing the plan. The role of the consultant is to assist Henry Barnard School with advising a path forward with recruitment, retention and growth, financial forecasting, and fundraising for scholarships. The plan should incorporate specific data, facts, and information to understand the school's past practices to provide a vision for the future.

Specific Activities / Deliverables

The consultant will provide Henry Barnard School and Rhode Island College with a comprehensive enrollment and marketing plan, which will include, but not limited to, the following:

- 1. 5-year Enrollment and Marketing Plan.** The strategy will analyze the school's current enrollment trends and marketing strategies over the past five (5) years by collecting specific data and providing advice on current strategies. The plan will provide specific action items to develop an advertising campaign and grow enrollment over the next 5 academic years (2016-2017 academic year to 2021-2022 academic year). The consultant will provide recommendations for specific strategic recruitment and retention program(s) along with estimated costs for implementation. The program(s) should take into consideration the limited resources available at Henry Barnard School and Rhode Island College.
- 2. 5-year Enrollment Projections.** The strategy will provide two (2) sets of enrollment projections for the next 5 academic years (2016-2017 academic year to 2021-2022 academic year). The first set of projections will provide projections based on the school's current strategies. The second set of projections will take into consideration the specific action items the consultant advises for implementation to grow enrollment. Each set of projections should break down the school's enrollment by grade, class, or the highest level of detail available.
- 3. Comprehensive Competitor Market Analysis.** The market analysis will analyze all current competitors, the approximate current cost of education for each competitor, and provide information of how Henry Barnard School can improve its positioning in the marketplace. The market analysis should take into consideration Henry Barnard School's current tuition rates and how they will compare to competitors over the next 5 academic years.
- 4. Strategy for Scholarship Fund Growth.** The consultant will advise and recommend specific strategies and initiatives for the expansion of the Henry Barnard School Retention and Bridge Scholarship Fund to maximize donations and revenue. The consultant will also provide additional strategies for alternative revenues to assist with scholarships and reducing the cost of education for students and families.
- 5. 5-year Financial Plan (FY 2017 to FY 2021).** The consultant will advise and recommend a 5-year financial plan that takes into consideration projected revenues and expenditures based on enrollment and financial support from Rhode Island College to alleviate the current fiscal pressures at Henry Barnard School. This will be done with the assistance of the Principal at Henry Barnard School and senior leadership at Rhode Island College.

SECTION 4: TECHNICAL PROPOSAL

Narrative and format: The separate technical proposal should address specifically each of the required elements:

1. Qualifications – Provide resumes/CV and describe qualifications and experience of consultant who will be involved in this project, including their experience in the field of education related to marketing and planning.

2. Capability, Capacity, and Qualifications of the Offeror - Please provide a detailed description of the Vendor's experience as a 3rd party consultants, including experience in a school setting. A list of relevant references must be provided, to include client names, addresses, phone numbers, dates of service and type(s) of service(s) provided.
3. Quality of the Work Plan/Suitable Methodology - Please describe in detail, the framework within which the consultancy will be performed. The following elements must be included: 1) interview, observe, analyze and advise on the current situation at HBS 2) formulate a strategic plan which encompasses the tasks of section 3

SECTION 5: COST PROPOSAL

Provide a cost proposal for the hourly rate fee structure based on the billable services outlined in this proposal, or a lump sum fee for completing the services within the six (6) month initial contract period. The hourly rate structure or lump sum fee should be based on an estimate of 400 billable hours.

Alternative fee schedule proposals will be considered; however, you must provide an understandable fee structure and explain the benefits of the alternative approach.

SECTION 6: EVALUATION AND SELECTION

Proposals will be reviewed by an Internal Committee comprised of senior leadership from Henry Barnard School and Rhode Island College. To advance to the Cost Evaluation phase, the Technical Proposal must receive a minimum of 60 (85.7%) out of a maximum of 70 technical points. Any technical proposals scoring less than 60 points will not have the cost component opened and evaluated. The proposal will be dropped from further consideration.

Proposals scoring 60 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in cost category, bringing the potential maximum score to 100 points.

Rhode Island College reserves the exclusive right to select the individual(s) or firm (vendor) that it deems to be in its best interest to accomplish the project as specified herein; and conversely, reserves the right not to fund any proposal(s). Proposals will be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Staff Qualifications/References	20 Points
Capability, Capacity, and Qualifications of the Offeror	25 Points
Quality of the Work Plan/Suitable Methodology	25 Points
Total Possible Technical Points	70 Points

Cost calculated as lowest responsive cost proposal divided by (this cost proposal) times 30 points *	30 Points
Total Possible Points	100 Points

*The low bidder will receive one hundred percent (100%) of the available points for cost. All other bidders will be awarded cost points based upon the following formula:

(low bid / vendors bid) * available points

For example: If the low bidder (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly cost and service fee and the total points available are Thirty (30), vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 * 30 = 19.5$$

Points will be assigned based on the offeror's clear demonstration of his/her abilities to complete the work, apply appropriate methods to complete the work, create innovative solutions and quality of past performance in similar projects.

Applicants may be required to submit additional written information or be asked to make an oral presentation before the technical review committee to clarify statements made in their proposal. The State reserves the right to interview any or all respondents to this RFP based on their proposal.

SECTION 7: PROPOSAL SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at gail.walsh@purchasing.ri.gov no later than **Thursday, March 3, 2016 at 5:00 PM**. Please reference **RFP #7550320** on all correspondence. Questions should be submitted in a Microsoft Word attachment. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. If technical assistance is required to download, call the Help Desk at (401) 222-3766 or lynda.moore@doit.ri.gov.

Offerors are encouraged to submit written questions to the Division of Purchases. **No other contact with State parties will be permitted.** Interested offerors may submit proposals to provide the services covered by this Request on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases will not be considered.

Responses (**an original plus four (4) copies**) should be mailed or hand-delivered in a sealed envelope marked "**RFP#7550320 Comprehensive Enrollment & Marketing Plan**" to:

RI Dept. of Administration
 Division of Purchases, 2nd floor
 One Capitol Hill
 Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the Division of Purchases will not be considered. The official time clock is in the reception area of the Division of Purchases.

RESPONSE CONTENTS

Responses shall include the following:

1. A completed and signed three-page R.I.V.I.P generated bidder certification cover sheet downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov.
2. A completed and signed W-9 downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov.
3. **A separate Technical Proposal** describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The Technical Proposal is limited to six (6) pages (this excludes any appendices). As appropriate, resumes of key staff that will provide services covered by this request.
4. **A separate, signed and sealed Cost Proposal** reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project.
5. In addition to the multiple hard copies of proposals required, respondents are requested to provide their proposal in **electronic format (CD-Rom, disc, or flash drive)**. Microsoft Word / Excel OR PDF format is preferable. Only 1 electronic copy is requested and it should be placed in the proposal marked "original".

CONCLUDING STATEMENTS

Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all proposals, and to award in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The State may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

The State's General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded to the RFP. The State's General Conditions of Purchases/General Terms and Conditions can be found at the following URL: <https://www.purchasing.ri.gov/RIVIP/publicdocuments/ATTA.pdf>