



MONTANA DEPARTMENT OF ADMINISTRATION

Director's Office

Greg Gianforte, Governor
Misty Ann Giles, Director

doa.mt.gov

406.444.2460

doadirector@mt.gov

NOTICE OF INTENT TO AWARD

Solicitation Title/Event Name:

Solicitation Number:

Solicitation Close Date:

Notice of Intent to Award Post Date:

Issuing Contracts Officer contact information:

The State intends to award a contract to the apparent successful offeror(s) of the above-mentioned solicitation. The Notice of Intent to Award shall not be considered a binding commitment by the state.

Under the Montana Procurement Act, the State has made the relevant scoring matrix/bid tab for the above-mentioned solicitation available for public inspection. Comments from the public regarding the proposed award must be submitted to the Contracts Officer listed above within this 7-day notice period.

Apparent Successful Offeror(s)

Unsuccessful Offeror(s)

**OPI-RFP-2024-0136AB
TAC Management and Facilitation**

SCORE SUMMARY WORKSHEET			
Category	Possible Points	EdMetric, LLC	The National Center for the Improvement of Education Assessment, Inc
Scope of Services/Provision of Services			
TAC Meeting Assembly and Facilitation	15	13	14
TAC Charter and Contract Drafting and Establishment	10	9	9
Advisory Services and Support	10	8	9.5
Meeting Coordination and Documentation	10	8.5	9
Data Analysis and Research Support	10	9	8
TAC Membership Management	10	8	9.5
References /Client Reference Forms			
Client Reference # 1	5	5	5
Client Reference # 2	5	5	5
Company Profile and Experience			
Years in Business	5	4	5
Relevant Experience	5	4	5
Relevant Past Projects	5	4	5
Resumes			
key Personnel	10	8	9.5
Cost Proposal			
Cost Proposal	20	20	20
Equal Pay for Montana Women			
Offerors who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Offerors who do not comply will not receive bonus points	6	6	6

OPI-RFP-2024-0136AB

TAC Management and Facilitation

Individual Scoring Matrix

The evaluator will review and evaluate the offers according to the following criteria, which are worth a total of 100 points: The Provision of Services, Statement of Qualifications, Company Profile and Experience, Resumes, will be evaluated based on the scoring guide. The Cost Proposal will be evaluated based on the formula set forth in the criteria.

Offeror (Company) Name: EdMetric, LLC			Total Points Awarded: 111
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Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Scope of Services/Provision of Services			
TAC Meeting Assembly and Facilitation	15	13.0	<p>This was a good response. They proposed a singular facilitator, PM that can streamline processes for organizing meetings, preliminary structured meetings that are designed for the Montana assessment landscape, they will conduct regular and interim meetings all planned at the start of the year. Some details were missing from the meetings, including the strategy, background, and facilitation. They proposed a collaborative framework that focused on policy alignment, resource optimization, technical expertise, and innovative strategies. They outlined the key objectives, anticipated risks, and mitigation strategies. The team employs best practices in meeting facilitation, drawing on their experience to encourage participation, manage time effectively, and maintain an inclusive environment. The proposed approach includes proactive scheduling, efficient meeting facilitation, and comprehensive meeting support; timely and detailed documentation, including flexibility and responsiveness. Thoughtfulness behind format and structure, named most tools and strategies for documentation, in-person meetings will be 1 time per year. The response included planning logistics that are thought out and proactive, orientation strategy, technical expertise, mitigation, etc.</p>

Offeror (Company) Name: EdMetric, LLC			Total Points Awarded: 111
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
TAC Charter and Contract Drafting and Establishment	10	9.0	They'll consider previous TAC input to draft a Montana specific TAC charter based on other stateTAC charters. They'll draft a comprehensive contract for TAC members, which will outline the expectations, and responsibilities, in terms of agreement for the members, ensuring transparency and accountability. They will execute the charter and contract upon finalization of the TAC charter and member contact, and EdMetric will facilitate the execution of these documents ensuring that all members are fully informed and in an agreement with the established guidelines and expectations. They are experienced and there is clarity about how they would complete this process. TAC charter will be a model for other states, leveraging other related state charters. They pulled in examples from the credentialing space with higher requirements, and will be customized for Montana.
Advisory Services and Support	10	8.0	They are prepared to provide papers, attend additional workshops, and communicate with Montana stakeholders. This response lacks the connection of assessment to other components such as accountability. This was a brief response, with minimal description, liked they would provide papers and attendance at workshops. Provided clarity around services, 'Montana's educational goals and meet the highest technical standards'.

Offeror (Company) Name: EdMetric, LLC		Total Points Awarded: 111	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Meeting Coordination and Documentation	10	8.5	The Program Manager Mark Phipps and TAC Facilitator Dr. Susan Davis-Becker will work closely with OPI and TAC members to establish a yearly calendar of three TAC meetings at the beginning of each fiscal year that takes into account the points in the assessment cycle at which TAC feedback can be most useful and impactful. EdMetric/ACS will employ the use of an AI-based notetaking software to enable immediate documentation that will be accessible to OPI and EdMetric/ACS along with the full meeting recordings. Dr. Davis-Becker will provide draft meeting notes and a meeting summary to OPI within five days of the meeting conclusion. The final approved versions will be delivered to meeting participants within 15 business days after the TAC meeting. The summary document will capture TAC guidelines as well as action items for OPI and the assessment vendor for each meeting topic. Uncertain of the effectiveness of monthly meetings that are shorter, especially if the meetings are proposed to be in-person. A little vague on the platforms, security of documentation, and meeting recordings. The timelines were vague around the frequency and effectiveness of the work being produced. Clear details on meeting coordination timelines, and resources for planning tasks.
Data Analysis and Research Support	10	9.0	The cadre (team) format brings more collaboration to data analysis and varying perspectives, reviewing vendor reports before the TAC meeting, and team for data analysis on TAC suggestions. They will develop and disseminate position statements, white papers, and other thought leadership pieces on key assessment issues. These publications will contribute to the broader assessment community and demonstrate Montana's commitment to innovation and excellence in educational assessment. The EdMetric/ACS team will jointly support OPI with ongoing data analysis and research using a cadre of established psychometricians, researchers, educators, and policy experts. They will review vendor reports before each TAC meeting and will guide support to OPI for data modeling and analysis to evaluate the impact of TAC recommendations on assessment systems, ensuring that decisions are data-informed and aligned with Montana's education goals.

Offeror (Company) Name: EdMetric, LLC		Total Points Awarded: 111	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
TAC Membership Management	10	8.0	This doesn't address the executing requirements, (if someone doesn't uphold the charter), but thoroughly addresses a plan for an innovative structure to address timely matters. A thoroughly planned replacement structure, while the cadre provides additional staff, may limit varied perspectives on topics. They will assist OPI in recruiting highly qualified TAC members with diverse expertise and backgrounds in assessment, psychometrics, education, and related fields. The table illustrates the building of the TAC over time rather than upfront. They were unclear if they understood the assessment director/OPI leadership will direct who is on the TAC/AAG, otherwise, the general expectations for TAC membership management were met.
References /Client Reference Forms			
Client Reference # 1	5	5.0	The reference from Indiana talks about being the TAC chair and fulfilling ESSA requirements including TAC facilitation. The reference gave all 4's or strongly agree responses.
Client Reference # 2	5	5.0	The references from ND and NE were all strong and agreed. ACS Ventures addresses TAC membership and alignment policy and standard setting but no TAC facilitation, organization, or charter mentions.
Company Profile and Experience			
Years in Business	5	4.0	They have been in business for a high number of collective years, based on the staff. This will be the first time EdMetric and ACS will come together to do strategic partnerships, there is no experience of them doing this work together. Very strong background in assessments with a large support team on both sides to consider the work at hand.
Relevant Experience	5	4.0	Table one shows a joint experience managing and facilitating TAC meetings, they also serve on TAC for MO, LA, MS, and national credit programs and previously served on the TAC. Project leads have facilitator experience but not SEA management experience, lacking overall experience.

Offeror (Company) Name: EdMetric, LLC		Total Points Awarded: 111	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Relevant Past Projects	5	4.0	They are strong in every area, and service on MT TAC is helpful, however, lacking through-year experience. Relevant experience in facilitation and managing educator meetings (alignments studies and standard setting), limited on TAC management & charter development. Table 2 shows the range of experience in organizing and implementing these meetings, working with program leaders and educator panelists, and collaborating with state TACs, but limited to standard setting and alignments. Table 3 references their peer review process.
Resumes			
key Personnel	10	8.0	Project oversight with extensive K-12 experience, the facilitator has less experience with K-12 assessment programs. There is experience within the cadre format but is hard to tell how much they will be directly involved with the TAC with outside members as well. Not sure of the number of staff directly at EdMetrics. ACS is a psychometric consulting company that works with clients for the design, development, and evaluation of their assessments. Unsure of the years of experience for EdMetric and ACS to be working together. Dr. Karla Egan will oversee the project, ensuring alignment with established goals and fulfillment of contractual commitments, and will collaborate with Dr. Susan Davis-Becker, who will serve as the lead TAC facilitator, managing the planning and facilitation of TAC meetings in partnership with OPI. Dr. Mark Phipps will serve as the Program Manger, coordinating all logistical aspects of the project, maintaining schedules, and managing communication between OPI and the EdMetric/ACS team. Unsure if cadre members will be subcontractors, not a lot of experience with TAC management from a stateside lens, through-year assessment experience with support roles for cadre members were unclear, limited in other areas for this work.
Cost Proposal			
Cost Proposal	20	19.9	
Equal Pay for Montana Women			
Offerors who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Offerors who do not comply will not receive bonus points	6	6.0	

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TAC Management and Facilitation

Individual Scoring Matrix

The evaluator will review and evaluate the offers according to the following criteria, which are worth a total of 100 points: The Provision of Services, Statement of Qualifications, Company Profile and Experience, Resumes, will be evaluated based on the scoring guide. The Cost Proposal will be evaluated based on the formula set forth in the criteria.

Offeror (Company) Name: The National Center for the Improvement of Education Assessment, Inc			Total Points Awarded: 120
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Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
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Scope of Services/Provision of Services			
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TAC Meeting Assembly and Facilitation	15	14.0	Coordinates TACs with 16 states, two large school districts, and one company. They serve on over 44 TACs nationwide, a testament to their expertise and ability to communicate complex ideas to a wide range of audiences. They support states in identifying important TAC topics, facilitating productive discussions, and synthesizing actionable recommendations. The team has expertise in various assessment-related issues, including extensive experience and deep understanding of Montana’s Aligned to Standards Through-Year (MAST). The Center is responsible for all costs and logistical arrangements associated with securing meeting space, webinars, travel TAC member payments, accommodations, refreshments, and lunches for each in-person TAC meeting. The considerations for every area were covered, including extensive experience with several TAC membership and facilitation roles listed, MAST experience, and understanding of MT’s educational goals. They provided clear parameters for TAC member expertise and a plan for filling all areas as well as providing room for Montana-based TAC members. They provided limited details on facilitation strategies (based on prior experience with other states).
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TAC Charter and Contract Drafting and Establishment	10	9.0	They provided a sample “TAC Charter” document, which referenced the experience in drafting charters. Proposed categories for the TAC Charter. The offeror has a professional relationship with a wide range of experts to propose 2 options per the position. They will have at least two in-state TAC members to help provide insight into the local context. They proposed a team to support the TAC to be more effective, this approach allows for complementary and efficient support for the state and the TAC.
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Offeror (Company) Name: The National Center for the Improvement of Education Assessment, Inc			Total Points Awarded: 120
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Advisory Services and Support	10	9.5	The included in the scope to author position papers on behalf of the OPI and will communicate with stakeholders, no detailed plan but addresses the requirements. They will participate in additional meetings, video calls, and telephone conference calls on psychometrics, assessment, and/or related topics on a case-by-case basis as required by OPI. They will author technical memos and other statements upon request following analyses of identified issues. They connected assessment to items such as accountability and district support. They have an extremely strong background and expertise in focus areas for MT assessments and the ability to support and advise in every area of assessment.
Meeting Coordination and Documentation	10	9.0	The team will facilitate each meeting, structure the discussions, and summarize key points for OPI staff to grasp practical and policy implications. The Center will provide written minutes of each TAC meeting within 14 calendar days following the meeting. They will use a variety of facilitation approaches to ensure all meeting participants have adequate opportunities to share their unique perspectives while maintaining a collaborative and productive discussion. The Center has professional relationships with a wide range of experts to propose 2 options per position. They defined the timelines for meeting planning, agenda drafting, summary, and a task list as well as in-person meeting planning. There is no specific staff assigned to the roles.
Data Analysis and Research Support	10	8.0	The offeror will review reports before the meeting, and will provide support for TAC requested data modeling. In addition to the two experts proposed for this project, the Center currently employs 13 other professionals with deep expertise in areas including psychometrics, growth modeling, accessibility, fairness, validity, and classroom assessment. The Center for Assessment will be able to support almost any data analysis and research needs requested by OPI.

Offeror (Company) Name: The National Center for the Improvement of Education Assessment, Inc			Total Points Awarded: 120
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
TAC Membership Management	10	9.5	They provided an extensive plan for how to cover all areas of assessment needs and analysis of the current structure. They will ensure TAC is aligned with the current needs, proposed, Dr. Scott Marian as the facilitator, who has an extensive background in TAC. A lack of detail in the overall approach but has an extensive background with TAC facilitation and being a member, requirements, rules around membership, and the assurance of meeting requirements.
References /Client Reference Forms			
Client Reference # 1	5	5.0	Reference from NH strongly agrees with all question responses, with a direct reference to TAC coordination for 20-years.
Client Reference # 2	5	5.0	Reference from UT strongly agrees on all questions, direct reference to TAC coordination and facilitation, including additional research and evaluation.
Company Profile and Experience			
Years in Business	5	5.0	With extensive experience and a large body of TAC work and expertise, they have been in business since 1998 and have been doing similar work since.
Relevant Experience	5	5.0	The Center for Assessment and Dr. Marion has managed and facilitated TACs since 1998 with 10 current TAC contracts, the Center supports state and district assessment and accountability systems. The Center collaborates with organizations that work directly with states and districts or whose work impacts states, including the Council of Chief State School Officers (CCSSO), Knowledge Works, Education First, The National Center for Educational Outcomes (NCEO), and the U.S. Department of Education. They provide and manage Technical Advisory Committees for states and districts to ensure they receive the best ongoing technical advice possible, focused on specific issues and decision-making needs of the individual state or the district. They have extensive TAC management experience, through years of experience on a national level and prior support with MT's MAST.

Offeror (Company) Name: The National Center for the Improvement of Education Assessment, Inc		Total Points Awarded: 120	
Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Relevant Past Projects	5	5.0	The Center coordinates TACs for 16 states, two large school districts, and one company. The Center professionals serve on over 44 TACs nationwide, which represents expertise and the ability to communicate complex ideas to a wide range of audiences. A table was provided with the current contracts. The extensive TAC management experience, through-year experience on a national level, and prior support with MT's MAST. They have done similar work (management and facilitation) in various states.
Resumes			
key Personnel	10	9.5	The main facilitator has experience working at the SEA level and experience with K-12 educational assessments. The additional staff are at the choice of MT, with no clear additional support staff identified. The Center has a board, 2 directors, and 15 staff which provides stability and knowledge across multiple areas. The main facilitator proposal of having an additional center staff serve on the TAC, with extensive background in board and leadership listed.
Cost Proposal			
Cost Proposal	20	20.0	
Equal Pay for Montana Women			
Offerors who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Offerors who do not comply will not receive bonus points	6	6.0	

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TAC Management and Facilitation

SCORING GUIDE

In awarding points to the evaluation criteria, the evaluator/evaluation committee will consider the following guidelines:

Superior Response (95-100%): A superior response is an exceptional reply that completely and comprehensively meets all of the requirements of the RFP. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to the agency.

Good Response (75-94%): A good response clearly meets all the requirements of the RFP and demonstrates in an unambiguous and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

Fair Response (60-74%): A fair response minimally meets most requirements set forth in the RFP. The offeror demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

Failed Response (59% or less): A failed response does not meet the requirements set forth in the RFP. The offeror has not demonstrated sufficient knowledge of the subject matter.

Score	5	10	15	20
Superior (95-100%)	4.7 - 5	9.4 - 10	14.1 - 15	18.8 - 20
Good (75-94%)	3.7 - 4.7	7.4 - 9.4	11.1 - 14.1	14.8 - 18.8
Fair (60-74%)	3 - 3.7	5.9 - 7.4	8.9 - 11.1	11.8 - 14.8
Failed (0-59%)	0 - 3	0 - 5.9	0 - 8.9	0 - 11.8

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TAC Management and Facilitation**

Cost Worksheet

Lowest overall cost receives the maximum allotted points. All other proposals receive a percentage of the points available based on their cost relationship to the lowest. Example: Total possible points for cost are 300. Offeror A's cost is \$20,000. Offeror B's cost is \$30,000. Offeror A would receive 300 points. Offeror B would receive 200 points ($\$20,000/\$30,000 = 67\% \times 300 \text{ points} = 200$).

Cost			
Points Available		20	
Lowest Cost		\$124,425.00	
Vendor Name	Proposed Cost	Points Earned	Notes:
EdMetric, LLC	\$125,000.00	19.9	
The National Center for the Improvement of Education Assessment, Inc	\$124,425.00	20.0	

Technical Scoring Session

OPI-RFP-2024-0136AB
TAC Management and Facilitation

Date 10/01/24
Time 2:30 PM - 3:30 PM

Location Teams

Evaluation Committee Members: Julie Murgel, Marie Judisch, Cedar Rose
Contracts Officer: Amanda Battin, amanda.battin2@mt.gov

Order of Evaluation: Alphabetical
Scoring Method: Consensus