

Request for PROPOSALS

Request for Proposals for Providers of Integrated Curricula and Targeted Instructional Supports for Children in Inclusive Preschool Classrooms to Participate in an Impact Evaluation

January 2018

RFP #40346-001

Mathematica Policy Research, Frank Porter Graham Child Development Institute, University of Florida

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OVERVIEW OF REQUEST FOR PROPOSALS

Mathematica Policy Research, Inc. (Mathematica), a U.S. Department of Education contractor under the contract No. ED-IES-14-C-0001 (Prime Contract), invites providers of integrated curricula (used to supplement the general preschool curriculum) and targeted instructional supports for children in inclusive public preschool classrooms to submit proposals to participate in the Evaluation of Preschool Special Education Practices (EPSEP). EPSEP is sponsored by the National Center for Education Evaluation and Regional Assistance (NCEE) within the Institute of Education Sciences (IES), U.S. Department of Education (ED). Mathematica collaborates on the design and administration of EPSEP with its partners the Frank Porter Graham Child Development Institute and the University of Florida (collectively referred to as the “study team”).

The purpose of EPSEP is to provide rigorous evidence on the implementation and impact of a two-component intervention program that reflects recommended practices in early childhood special education in inclusive preschool classrooms.¹ The intervention program (described in more detail in section A) should include a content-specific language, literacy, and/or social-emotional/behavioral supplemental curriculum suitable for all children integrated with targeted instructional supports designed so children with disabilities participate fully in the curriculum. The evaluation will assess the impact of the selected intervention program on outcomes for both (1) the children in inclusive preschool classrooms who receive IDEA services and (2) the children in these classrooms who do not receive IDEA services. The setting for the evaluation will be in public schools.

EPSEP is proceeding in two stages based on information gathered through a Sources Sought Notice. Phase 1 (the current stage) will be a small-scale efficacy study to test whether the two components of the intervention program can be implemented together (with fidelity) in inclusive classrooms and can work with a broad range of disabilities. The efficacy study will also provide initial evidence of impacts on child outcomes. Based on the results from the efficacy study, IES may sponsor a Phase 2 large-scale effectiveness study.

This Request for Proposals (RFP) invites offerors² (including researchers, publishers, and other organizations involved in the development and provision of training on the implementation program components described above) to apply to provide initial training and ongoing support to implement their proposed intervention program in the Phase 1 of EPSEP, the small-scale efficacy study. The selected offeror will be responsible for providing initial training and ongoing support to approximately 13 treatment schools (and 26 inclusive preschool classrooms in those schools) spread across 3 U.S. school districts that will be selected by the study team. The planned period of implementation will begin with initial training in summer 2019, followed by ongoing support throughout the 2019-2020 school year. Offerors may propose an additional year of training and ongoing support in 2020-2021, if appropriate for their intervention program’s theory of action

¹ *Inclusive preschool classrooms* are those in which preschool-aged children with disabilities are served alongside those without identified disabilities, and most of the class is composed of children without identified disabilities.

² In this document, the term “offerors” refers to those who prepare proposals to do this work (i.e., the bidders). Offerors may include those who were involved in developing the proposed intervention program, but this is neither expected nor required.

(for example, if offerors expect that a year of experience is needed for teachers to achieve acceptable implementation fidelity).

All training and other materials for the intervention program must already exist and each key component must have been previously implemented in a school setting. No funding will be provided for curriculum, technology, or other substantial program development. However, to ensure that the intervention program meets the needs of the evaluation, the study team will allow for modest customization or adjustment of training materials and the fidelity measures.

Offerors are encouraged to respond to the RFP as a consortium of multiple organizations or providers/developers if necessary to support implementation of the proposed intervention program. Offerors must have experience providing training and implementation support to educators and the capacity to provide this training and support for the current Phase 1 study. Offerors must also be able to increase their capacity, if needed, to implement at the scale necessary for the potential Phase 2 large-scale impact study.³

Proposals will be evaluated on the basis of technical criteria and price reasonableness. Up to four offerors will be selected to provide written responses to questions and conduct an in-person oral presentation in Washington, D.C. The study team, in consultation with IES and an expert review panel, will then select one offeror's intervention program for inclusion in the evaluation through a subcontract issued by Mathematica.

This RFP, which focuses on the Phase 1 efficacy study, is organized into the following sections: Section A provides a rationale for the study, a high level logic model that guides the evaluation, required characteristics of the intervention program, a description of the evaluation design, and roles and responsibilities of the study team and the selected provider. Section B addresses the statement of work. Section C includes the proposal requirements including general instructions, review process and criteria, budget and subcontract structure, and requirements for technical and business proposals.

³ The Phase 2 large-scale impact study could occur in a sample of approximately 54 treatment schools (and 108 inclusive preschool classrooms in those schools) spread across 12 U.S. school districts.

A. EVALUATION OF PRESCHOOL SPECIAL EDUCATION PRACTICES (EPSEP) BACKGROUND

Policymakers have long recognized that, for young children with disabilities, identifying their needs early and providing appropriate services and supports are key to improving educational outcomes. Under the Individuals with Disabilities Education Act (IDEA), eligible children, including those 3 through 5 years of age, are guaranteed to have access to a free, appropriate, public education. Eligible children are also entitled to receive the special education and related services they need to progress academically, guided by an individualized educational program (IEP) developed by school personnel and their family. In addition, IDEA requires that IEP services be carried out in the least-restrictive environment. Updates to IDEA in 2004 placed greater emphasis on enabling preschool children with disabilities to participate and make progress in the general preschool curriculum, and to improve their developmental and pre-academic outcomes.

Recently, the U.S. Departments of Education and Health and Human Services issued a joint policy statement consistent with the objectives of IDEA 2004 that “all young children with disabilities should have access to inclusive high-quality early childhood programs, where they are provided with individualized and appropriate support in meeting high expectations” (ED and HHS, 2015). The Council of Exceptional Children’s Division for Early Childhood (2014) recommends that practitioners support instruction for children with disabilities through individualized learning opportunities that are embedded in the context of the preschool curriculum as part of the ordinary classroom activities and routines to help them access, participate, and learn in an inclusive environment.

For the nearly 750,000 children ages 3 through 5 receiving special education and related services through IDEA, little is known about the large-scale effectiveness of instructional supports provided in inclusive classrooms promoting the learning outcomes that ED’s Office of Special Education Programs has identified as most important:⁴

- Acquisition and use of knowledge and skills (including early language/communication and early literacy skills),
- Positive social-emotional skills, and
- Use of appropriate behaviors to meet one’s needs.

IES intends the EPSEP study to help fill this gap in knowledge and inform practice in inclusive preschool settings. The Phase 1 study will first test the efficacy of an intervention program that integrates a content-specific supplemental curriculum with targeted instructional supports (aligned with the Division for Early Childhood’s [2014] recommended practices) when implemented in several school districts. This intervention program will be implemented within the context of an existing general preschool curriculum. A later Phase 2 effectiveness study may

⁴ States are required to measure and report their performance on these outcomes for preschool children with disabilities annually, according to IDEA 2004 Part B Indicator 7.

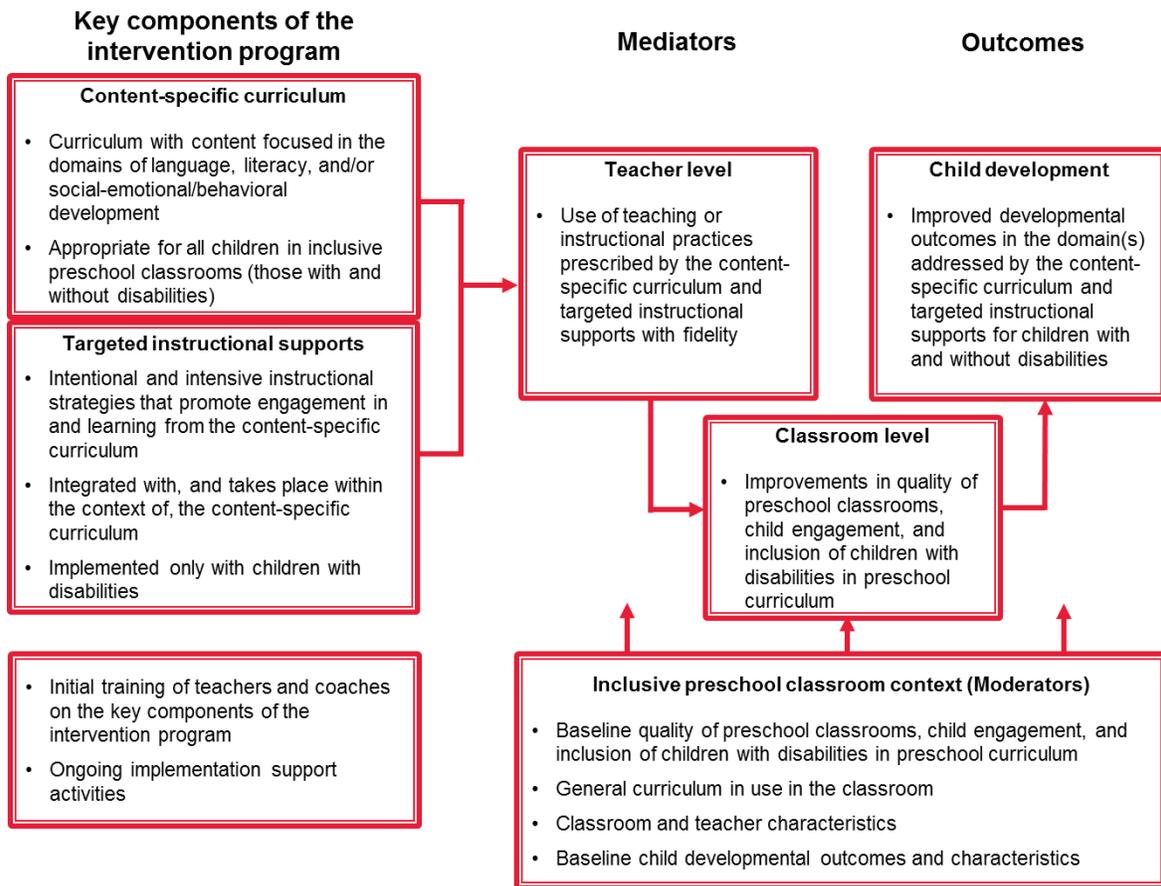
be funded to test the intervention program on a large scale (i.e., with a larger sample of preschool classrooms across multiple districts and across multiple states).

A.1. Theory of Action/Logic Model

The implementation of a combination of a content-specific curriculum and targeted instructional supports (referred to in this RFP as the “intervention program”) is intended to enable all children, including those with disabilities, to be involved in and make progress in the general preschool curriculum in inclusive preschool settings (Brown, Knopf, Conroy, Googe, & Greer, 2013; Horn & Banerjee, 2009; Snyder, Bishop, & McLaughlin, 2017).

The high-level logic model shown in Exhibit 1 was developed by the study team to guide the evaluation. It displays the connections among the two-component intervention program, the implementation supports, the context of the inclusive setting, expected mediation pathways, and child outcomes of interest.

Exhibit 1. Logic model of the EPSEP intervention program



- **Content-specific curriculum.** The intervention program will include a supplemental curriculum with content and instruction designed to enhance children’s language skills, literacy, and/or social-emotional/behavioral development and that is appropriate for all children in inclusive preschool classrooms (those with and without disabilities). The curriculum must address at least one of these developmental skill domains, but does not

have to address all of them. The content-specific curriculum will be implemented in the context of an existing general curriculum – it does not replace the existing general curriculum.

- **Targeted instructional supports.** The intervention program will also include intentional and intensive instructional strategies⁵ that teachers⁶ use to support learning for children with disabilities and promote their engagement with and learning from the content-specific curriculum. Targeted instructional supports are integrated with, and take place within the context of, the content-specific curriculum. These supports can feature brief and minimally intrusive embedded teaching episodes throughout the day (Snyder, Rakap, Hemmeter, McLaughlin, Sandall, & McLean, 2015). When appropriate during the delivery of the content-specific curriculum and in other activities occurring throughout the preschool day, the teacher provides embedded individualized instruction for each child with disabilities to practice and learn targeted skills. For example, during a small-group literacy activity in which the instructional focus from the content-specific curriculum is on phonemic awareness, the teacher would embed additional instruction for the child with a disability based on the goals of the child’s individualized education program related to early literacy skills and the literacy curriculum.
- **Implementation supports.** These are the initial training and ongoing support activities the offeror shall provide through professional development or other means to ensure high-fidelity implementation of the intervention program. The frequency, intensity and content of the training and support shall be sufficient to aid classroom instructional staff and/or other relevant staff to implement the intervention program during the evaluation.
- **Mediators.** The intervention program’s impact on child outcomes is hypothesized to take place both through the teaching and instructional practices prescribed by the intervention program and through classroom-level quality improvements (that may be considered outcomes in their own right).
 - **Teacher level** mediators focus on whether classroom staff are using the teaching or instructional practices as intended, including whether they are effectively coordinating all the practices that are being implemented.
 - **Classroom level** mediators include improvements in classroom quality, children’s engagement in classroom activities, and the inclusion of children with disabilities (which are hypothesized to result from changes at the teacher level).
- **Child outcomes.** The study will use standardized assessments to assess the specific developmental domains that are the focus of this study (that is, children’s language, literacy, and social-emotional/behavioral skills development). We intend to assess outcomes in the domain(s) that are the focus of the selected intervention with multiple measures, but also those in the other domains of interest. The study will measure outcomes for children with identified disabilities who are receiving IDEA services as of the start of the implementation

⁵ *Intentional* refers to identifying the skill that will be taught and planning when and how it will be taught during ongoing classroom activities. *Intensive* refers to providing sufficient learning opportunities both within and across ongoing classroom activities on the skill being taught to address the child’s pace and phase of learning.

⁶ By *teachers* we mean the classroom staff with primary responsibility for instruction in classrooms. These staff may include both certified teachers and paraprofessionals.

year as well as for children in study classrooms without identified disabilities as of the start of the implementation year.

- **Inclusive preschool classroom context (moderators).** These contextual factors include any interactions that could either boost or attenuate the effect of the intervention program on outcomes. For example, the effectiveness of the content-specific curriculum could vary depending on the baseline quality of the classroom, the general curriculum in use, classroom composition, teacher experience, children’s developmental outcomes at the start of the year, and so forth.

A.2. Requirements for Offerors

Offerors shall be responsible for submitting a proposal that demonstrates the requirements discussed below (See section C.4.2 for technical proposal requirements). The general logic model in Exhibit 1 is presented at a high level of abstraction. In the proposal, the offeror must provide a logic model specific to their proposed intervention program. See the proposal requirements for the logic model in section C.4.2.

A.2.1. Content of the intervention program

Offerors must propose to provide an intervention program that integrates a content-specific curriculum and targeted instructional supports. The intervention program must be focused on language, literacy, and/or social-emotional behavioral domains (see Exhibit 2; the study team will assess skills in all three domains of interest regardless of the focus of the intervention program). The content-specific curriculum must be appropriate for children ages 3 through 5, including those with disabilities, who are served in inclusive preschool classrooms. The targeted instructional supports must align with the content-specific curriculum and be designed to support children with disabilities to engage more fully in the content-specific curriculum in the inclusive classroom.

Exhibit 2. Description of child outcome domains

Domain	Outcome examples
Language development	Outcomes that assess the ability to communicate and understand thoughts or ideas through speech, use developmentally appropriate discourse skills, and display grammatical knowledge or skill. Examples include receptive and expressive vocabulary, and auditory comprehension skills.
Literacy	Outcomes that assess alphabets (phonemic and phonological awareness, letter identification, print awareness, and phonics), fluency, and comprehension (text/symbol comprehension and listening comprehension)
Social-emotional/behavioral skills	Outcomes that assess behavioral, social, and emotional competencies underlying school readiness, such as prosocial or problem behaviors, social interactions, cooperation, self-concept, engagement, attention, persistence, impulsivity, self-control, and initiative

Note: The outcome measures have not yet been selected. The study team will consult with the selected offeror to choose outcome measures that are aligned with the logic model of the intervention program.

A.2.2. Implementation supports

Offerors must complete initial group training on the intervention program for all study schools assigned to the treatment group prior to the start of the 2019-2020 school year (completed within four weeks of the start of the school year in each study district). Offerors must

provide ongoing implementation support for teachers throughout the 2019-2020 school year (which may take the form of refresher group trainings, coaching, observations, webinars, responding to questions by phone or email, etc.). Offerors may propose extending the implementation support through the 2020-2021 school year, if appropriate to their logic model. See the proposal requirements for the implementation training and support plan in section C.4.2.

A.2.3. Capacity

Offerors must have experience providing initial training and ongoing support on the intervention program to enable preschool educators (and school- or district-employed coaches, if applicable) with varying experience levels to implement with adequate fidelity. Offerors must also have the capacity and sufficient trained staff available to provide the initial training and ongoing support to staff at the scale planned in the Phase 1 efficacy study (approximately 40 teachers in 20 inclusive preschool classrooms in 13 public schools spread across 3 U.S. school districts located around the country to be selected by the study team) within a five-week period, from approximately the last week of July through the third week of August 2019. In addition, offerors must also demonstrate that they have the capacity and staff, or can build the capacity and staff, to provide initial training and ongoing support at the scale planned for the potential Phase 2 impact study (approximately 216 teachers in 108 inclusive classrooms in 54 public schools spread across 12 U.S. school districts). See the proposal requirements for qualifications and capacity in section C.4.2.

A.2.4. Intensity

The offeror's proposed intervention program must be proposed at a frequency, duration, and intensity needed to impact child outcomes in language, literacy, and/or social-emotional behavioral domains. The study team will measure outcomes in all three domains regardless of the focus of the intervention program. The intervention program must be able to be provided realistically within the context of preschool classroom schedules.

A.2.5. Fidelity

The offeror must be able to document their ability to deliver the proposed intervention program with fidelity to treatment teachers and the ability of treatment teachers to implement the intervention program as intended through the existence of:

- Written intervention program materials,
- Written initial training and ongoing support materials and processes, and
- A *training fidelity* measure or measures covering all key components with clear measurable thresholds to define adequate fidelity. Offerors may have separate training fidelity measures for delivering the intervention program in training workshops and for coaches if coaching is part of the intervention program.
- An *implementation fidelity* measure that covers the delivery of the intervention program by teachers to students.
- Prior evidence of adequate implementation fidelity in school settings and information on the expected timeframe required to achieve adequate fidelity in previous implementations.

If needed, the offeror shall work with the study team to refine their fidelity instrument(s) to measure fidelity at scale. See the proposal requirements for implementation fidelity in section C.4.2.

A.2.6. Evidence of efficacy/effectiveness

The offeror's proposed intervention program must have been implemented previously with fidelity and have prior evidence of efficacy and/or effectiveness, or at least a research-based rationale for improving the language, literacy, and/or social-emotional-behavioral outcomes of children ages 3 through 5, including those who have disabilities. See the proposal requirements for evidence of efficacy/effectiveness in section C.4.2.

A.3. EPSEP Study Design

The following provides information about the design of EPSEP to be conducted by the study team. The evaluation is designed to provide rigorous evidence on the efficacy of a high quality implementation of the offeror's intervention program for children ages 3 through 5 who are served in inclusive preschool classrooms in public schools.

In the spring of 2019, the study team will randomly assign participating schools to a treatment group that will receive initial training and ongoing supports to implement the intervention program or to a control group that will continue to use the curricula and supports that they normally would use in the absence of the study (a business-as-usual condition). A priority criterion for selecting schools to participate in the study will be that their business-as-usual condition represents a meaningful contrast with the offeror's intervention program. The study team will compare child outcomes between the treatment and control groups to assess the impacts of the selected intervention program. The study team will examine implementation fidelity or how well the supplemental curriculum and targeted instructional supports were implemented together, including aspects of the intervention that worked well, aspects that were challenging, and any lessons learned for future implementation. To ensure that the study provides useful context for policymakers and school districts, the study team will also analyze classroom and inclusion quality. Exhibit 3 shows the study's research questions, as well as the data sources and analysis methods to address each question. Exhibit 4 shows the expected sample sizes for the study.

Exhibit 3. Research questions, analysis approach, and data sources

Research questions	Analysis approach	Data sources
Impact		
What are the impacts of the intervention program, relative to a business-as-usual control condition, on the language, literacy, and social-emotional/behavioral skills of children with disabilities <u>and</u> of children without disabilities in inclusive preschool classrooms?	<ul style="list-style-type: none"> Regression-adjusted differences in child outcomes between treatment and control groups accounting for school-level random assignment design and for clustering of children within schools (with separate subgroup analyses). 	<ul style="list-style-type: none"> Child outcomes on one or more measures of language/literacy and social emotional/behavioral skills collected in spring 2020^(a) Child characteristics and baseline outcomes collected in fall 2019⁶ as covariates
Intervention Implementation		
What initial training and ongoing support are provided?	<ul style="list-style-type: none"> Conduct descriptive analyses with measures pertaining initial training and ongoing support and training fidelity 	<ul style="list-style-type: none"> Training fidelity instruments Provider support logs
Are teachers able to implement the supplemental curriculum and targeted instructional supports together with fidelity?	<ul style="list-style-type: none"> Conduct descriptive analyses with implementation fidelity measures 	<ul style="list-style-type: none"> Implementation fidelity instrument
What are the key challenges to implementing the intervention?	Conduct descriptive analysis using surveys of teachers' experience implementing the intervention	<ul style="list-style-type: none"> Teacher surveys Implementation fidelity instrument
What aspects of intervention worked well?		
What are the impacts of the intervention program, relative to a business-as-usual control condition, on quality of the classroom environment?	<ul style="list-style-type: none"> Compare intervention-specific fidelity measure and classroom quality and inclusion measures between treatment and control groups 	<ul style="list-style-type: none"> Observations of classroom quality and inclusion

^(a) If the offeror proposes a second implementation year, the study team will also collect baseline data in fall 2020 and outcome data in spring 2021 on the next cohort of children taught by participating teachers.

Exhibit 4. Expected sample sizes

Level	Sample size
Number of districts	3
Number of schools	26
Treatment schools	13
Control schools	13
Number of classrooms per school ^(a)	1.5
Classroom size	18
Children with identified disabilities ^(a)	4
Children without identified disabilities ^(a)	4
Teachers and/or classroom staff	2

^(a) We believe these numbers are feasible based on a survey conducted by the study team with a nationally representative sample of districts. Although sample sizes are higher than the proportions of children with disabilities that occur naturally in the population, they are within the range that districts reported serving in inclusive classrooms.

The study team will collect data on children with and without disabilities in the study classrooms because they will be exposed to and could be impacted by the intervention program. The study team expects that each classroom will serve 18 children. Of these 18 children, the study team estimates that 3 to 4 will be receiving special education and related services through IDEA Part B for an identified disability, while the rest will not. We expect that the study will include most or all of the children with disabilities in a classroom and a sample of 4 children without disabilities.^{7,8} The study is designed to yield an expected minimum detectable effect (MDE) of 0.50 standard deviations for all children with disabilities (across disability categories), 0.50 for children without disabilities, and 0.39 for the combination of both subgroups.

See the proposal requirements about the intervention program's suitability for and feasibility for use in EPSEP in section C.4.2.

A.4. Study Team and Provider Roles and Responsibilities

This section presents a general overview of roles and requirements.

A.4.1. Study team responsibilities

- **Conduct district and school recruitment.** The study team will recruit and select the study districts. Because districts have not yet been selected for participation, offerors should assume the participating districts will be geographically spread across the United States. In selecting schools, the study team will prioritize schools with (1) preschool-aged students whose needs are aligned with the intervention program and (2) a business-as-usual condition that represents a meaningful contrast with the intervention program.
- **Conduct random assignment.** The study team will randomly assign participating schools either to the treatment group or to continue with typical activities (business-as-usual).
- **Conduct data collection for the evaluation.** The study team will select the measures, develop data collection instruments (except the fidelity measures), and collect all implementation and outcome data for the evaluation. This includes data on implementation fidelity in treatment and control schools.
- **Coordinate with districts.** The study team will work with district and school administrators to maintain their support for the implementation of the intervention program and encourage attendance by teachers to the initial training and ongoing implementation support activities when needed.

⁷ The Office of Special Education Programs (OSEP) recommends that the number of children with disabilities in inclusive classrooms be consistent with their natural proportion in the population. Although we acknowledge that this is a goal, districts reported that they serve an average of 6 children with disabilities in inclusive classrooms. Including 4 children per classroom, as in the current design, is in line with what seems to be current practice in schools. These sample sizes also will provide the power to detect differences of the desired size, accounting for attrition.

⁸ We will select 4 children with disabilities per classroom (if there are 4 or more). If there are fewer than 4 children with disabilities, we will select them all. We will sample 4 children without disabilities per classroom, for a total of about 8 children per classroom.

- **Support district and school staff time.** The study team will be responsible for the cost of any district or school staff time associated with evaluation activities (for example, time attending trainings, costs for substitute teachers, etc.).
- **Coordinate training.** The study team will coordinate the logistics for the initial training activities. This includes scheduling the initial trainings; coordinating attendance of teachers and staff; and covering any fees for conference facilities, teacher travel and lodging, time and travel for the study team to attend the trainings, and other like costs. The study team will attend each initial training to provide hands-on support (passing out and collecting materials and so on). In addition, if the ongoing supports include any substantial training events (“substantial training events” to be agreed upon by offeror and study team), the study team will provide support to coordinate these activities.
- **Conduct analysis and reporting of the fidelity of implementation and the impacts of the selected intervention program.** The study team will examine implementation fidelity (in terms of the delivery of training and delivery of the intervention by teachers) and will assess the impact of the selected intervention program on child outcomes as of the end of each implementation year.

A.4.2. Provider responsibilities

- **Provide intervention program materials.** The selected offeror shall provide all instructional materials (instructors’ guides, texts, access to online materials, etc.) that are needed to implement the intervention program. School districts will not be expected to purchase materials or professional development specific to the intervention program.
- **Provide training materials to the study team.** The selected offeror shall submit training agendas, any training fidelity measures, and copies of training and support materials to the study team. The selected offeror shall also enable the study team to collect attendance logs when present at training events, or collect and submit attendance logs for any training event not attended by the study team.
- **Provide and train the study team to administer the implementation fidelity measure.** The selected offeror shall work with the study team to adjust their implementation fidelity instrument if needed to allow the study team to administer the measure. The selected offeror shall train the study team to administer the implementation fidelity measure reliably, and shall be available to respond to questions during the data collection.
- **Support recruitment activities.** As needed, the selected offeror shall help the study team share written materials or answer any questions that arise during district recruiting. Offerors should assume this will involve participating in up to 20 telephone calls with districts during the recruiting period.
- **Provide initial training to treatment teachers and staff.** The selected offeror shall work with the study team to finalize the initial training schedules and materials, and then be responsible for conducting all initial group trainings. The selected offeror shall supply all staff needed to lead training for approximately 40 teachers or relevant staff (assuming two staff members per treatment classroom) and ensure that all staff have appropriate credentials, experience, and preparation. If the intervention program requires a separate or concurrent training for on-site coaches, the selected offeror shall provide these trainings and

shall work with study team to schedule and hold them. The selected offeror shall cover the cost of transportation and lodging and time of its own training staff, as well as of their other staff.

- **Provide ongoing implementation support to treatment teachers and staff and document the support.** The selected offeror shall provide ongoing support at the level the developer considers sufficient to support high fidelity implementation. The ongoing support might include conducting direct observations in classrooms, providing feedback to on-site coaches who conduct direct classroom observations (if applicable), and/or holding regular small group webinars or conference calls. The selected offeror shall manage the logistics of providing the ongoing support (for example, scheduling visits to schools), however the study team will provide logistical support for any substantial training events that take place during the year (“substantial training events” to be agreed upon by the offeror and study team).
- **Submit documentation to the study team on the initial training and ongoing supports.** The selected offeror shall complete monthly logs developed by the study team to document the initial training and ongoing support provided during the study period. The logs will include the following for each teacher/school/district: (1) Frequency of training events and distribution of other supports; (2) Intensity of ongoing implementation supports delivered; (3) Uptake of initial training and ongoing implementation supports for each type of support provided; (4) Barriers to delivery and receipt of supports; (5) Factors aiding in the delivery and receipt of ongoing implementation supports; (6) The number of teachers requiring supplemental training because of struggles with implementation and the training provided; (7) Training fidelity information related to initial trainings and coaching.

B. TECHNICAL SPECIFICATIONS

This portion of the RFP provides information on the tasks to be undertaken and the anticipated timeline. The period of performance for this subcontract is divided into a Period 1 and a Period 2. Period 1 shall begin in May 2018 through June 2020, at the end of the 2019-2020 school year. Period 2 is an option for a second year of implementation that may be exercised and if so would begin in May 2020 and last through June 2021 (if a two-year implementation is proposed). Period 2 activities are an option to the subcontract and may be funded at the discretion of IES.

B.1. Statement of Work for Period 1 (Award through 6/30/2020)

The selected offeror shall provide initial training within four weeks of the start of the 2019-2020 school year and provide ongoing support (coaching, other group trainings, and/or other supports the developer considers important) throughout the 2019–2020 school year. The tasks and deliverables outlined in this section shall be the responsibility of the selected offeror. (See Exhibit 6 for a full list of anticipated deliverables and due dates, and Exhibit 7 for a detailed timeline.)

The selected offeror shall fulfill the following tasks:

Task 1. Communication with study team (June 2018 – June 2020)

Task 1.1. Study kickoff meeting

Key offeror staff (maximum of four) shall meet with the study team and staff from IES within 15 working days of award of subcontract (anticipated award May 30, 2018). This meeting shall be held in Washington, DC. The objective of this meeting will be to review contractual obligations, review the study timeline, and discuss any offeror questions. At least 2 weeks before the meeting (and within 1 week of subcontract award), the offeror shall provide written input on the kickoff meeting agenda to the study team. Within 2 weeks following the meeting, the offeror shall submit a memo to the study team summarizing the key issues and concerns raised at the meeting and how each will be addressed.

Deliverables: Input on kickoff meeting agendas
 Kickoff meeting summary

Task 1.2. Periodic calls with study team

The offeror shall participate in regularly scheduled telephone meetings with the study team to support effective planning, implementation, and compliance with study reporting requirements. During these calls, the offeror shall: (1) share training and ongoing support plans, (2) identify implementation challenges and approaches to resolve them, (3) identify any deviations from expected implementation, and (4) present issues or questions requiring feedback/guidance from the study team. The meetings will be biweekly prior to the implementation period (June 2018 to June 2019), and then weekly throughout the implementation period (July 2019 to June 2020). The offeror shall submit an agenda for each call to the study team at least one day prior to the call. The offeror shall create a summary of discussions that arose during the call and submit the summary to the study team within two days following each call.

Deliverables: Call agenda
Periodic meeting summaries

Task 1.3. Attend technical work group meeting

The offeror shall attend a one-day meeting of the study's technical work group. The meeting will describe the study and solicit feedback on the design and will be held in fall 2018. Upon request, the offeror shall provide slides or other presentation material describing the intervention, and review presentation materials developed by the study team. For budgeting purposes assume two people travel to Washington DC for a one-day meeting.

Deliverable: Presentation materials (if requested)

Task 1.4. Monthly progress reports

The offeror shall submit monthly progress/exception reports with their invoices to the study team by the 16th day of the month for work completed the prior month (July 2018 through July 2020). These reports must (1) summarize the major activities and accomplishments of the previous month, comparing progress with the planned schedule and describing any problems encountered; (2) describe activities planned for the next month; (3) identify any significant deviations from the implementation plan as well as any anticipated issues; (4) describe plans for addressing any exceptions to the implementation plan; and (5) outline any decisions that may be needed from the study team or ED. Upon award, the study team will provide more information on the required format for the monthly progress/exception reports.

Deliverables: Monthly progress reports

Task 2. Site recruitment assistance (October 2018 – May 2019)

The offeror shall describe its intervention program as part of the proposal. Based on discussions among the provider, the study team, and IES at the study kickoff meeting, the offeror shall develop a brochure on the intervention program suitable for sharing with districts and schools during site recruitment. The offeror shall also prepare a document with answers to frequently asked questions that district staff may have about the intervention program. The offeror must submit a draft of these materials to the study team within four weeks of the subcontract award date.

To present more information to districts and schools, the offeror shall prepare a brief recorded webinar presentation describing the provider's intervention program. The offeror shall submit a draft script for the webinar to the study team within four weeks of subcontract award, and a final version within two weeks of receiving comments from the study team and IES. Within two weeks of submitting the final script, the offeror shall submit a recorded webinar presentation to the study team following the final script.

Although the study team will be responsible for recruiting districts and schools to participate in the impact evaluation, districts and schools probably will have questions about the intervention program that the offeror is well-positioned to address. When requested by the study team, the offeror shall review recruiting materials developed by the study team and participate in calls made by the study team to districts and schools to further explain the program. For budgeting purposes, offerors shall assume that they will participate in up to 10 one-hour recruiting calls.

Deliverables: Brochure
Frequently asked questions document
Draft webinar script
Final webinar script
Recorded webinar presentation
Participate in recruiting calls (up to 10)

Task 3. Intervention program logic model, fidelity measures, and materials (June 2018 – December 2019)**Task 3.1. Intervention program-specific logic model and fidelity measures**

The offeror shall initially submit an intervention program-specific logic model and an implementation fidelity measure as part of the proposal. The offeror shall make adjustments to the submitted intervention logic model and implementation fidelity measure to reflect the requirements of the evaluation and reflect any modifications proposed during the selection process and discussions among the provider, the study team, and IES. The offeror shall submit the modified intervention-specific logic model and implementation fidelity measure to the study team no later than eight weeks after the subcontract award. The study team will provide comments within two weeks. The offeror shall submit a final intervention-specific logic model and implementation fidelity measure to the study team that is responsive to those comments within two weeks.

Deliverables: Revised intervention program-specific logic model
Revised implementation fidelity measure
Final intervention program-specific logic model
Final implementation fidelity measure

Task 3.2. Training fidelity measure

The offeror shall provide a training fidelity measure, if one exists, as part of the proposal. The offeror shall make adjustments to an existing training fidelity measure to reflect the requirements of the evaluation and any modifications proposed during discussions with the study team and IES. If no training fidelity measure exists, the offeror will collaborate with the study team to develop one. The offeror shall submit a draft training fidelity measure to the study team no later than 24 weeks after contract award and a final version by January 15, 2019.

Deliverables: Revised/draft training fidelity measure
Final training fidelity measure

Task 3.3. Intervention program materials

The offeror shall submit a draft of the intervention program materials to be used in the evaluation to the study team no later than 24 weeks after the subcontract award. These are likely to be materials that have been previously used to implement the intervention program. The offeror shall include a brief 1-2 page description of any modifications that will be made to the intervention program materials for use in this evaluation. The offeror shall provide final materials to the study team on January 15, 2019 that are responsive to study team and IES comments.

Deliverables: Draft intervention program materials
Final intervention program materials

Task 4. Training and ongoing support plan (June 2018 – May 2019)

Task 4.1. Initial training plan

The offeror shall submit information about their plan for initial group training as part of the proposal. The offeror shall develop an initial training plan that includes additional details and reflects changes resulting from discussions among the provider, the study team, and IES during and after the selection process. In the plan, the offeror shall include: (1) the number and schedule of training events, (2) staffing plans, (3) an agenda for each day, (4) materials and resources to be disseminated, (5) technology requirements, and (6) the training fidelity measure, if one exists.

The offeror shall raise any details of the initial training plan that may have implications for recruitment with the study team early in the subcontract, such as a need to train district-based coaches prior to the start of the school year. The offeror shall submit a draft of their initial training plan to the study team by February 16, 2019. The study team will review and comment on the draft plan within four weeks. The offeror shall revise the plan to reflect comments and indicate the specific dates or date ranges and which staff will conduct each training once the locations of the study districts and number of treatment teachers or relevant staff are known. The offeror shall revise the plan to reflect comments received and submit the final training plan to the study team by May 15, 2019. The offeror must communicate any subsequent changes to this plan at least two weeks before the change being implemented and must receive approval for the changes from the study team.

Deliverables: Draft initial training plan
 Final initial training plan

Task 4.2. Ongoing implementation support plan

The offeror shall submit information about the plan for ongoing implementation support during the implementation year(s) (2019-2020 school year, including 2020-2021 if a two-year implementation is proposed) as part of the proposal (e.g., the format, frequency, hours of ongoing support, technology requirements). The offeror shall develop an ongoing implementation support plan that includes additional details and reflects changes resulting from discussions among the offeror, the study team, and IES during and after the selection process. In the plan, the offeror shall include: (1) the number and schedule of training activities, (2) mode and structure of support (e.g., online, in-person) (3) staffing plan, (4) agenda for each of the activities, (5) materials and resources to be disseminated, (6) technology requirements, and (7) the training fidelity measure, if one exists. The staffing plan shall describe which trainers shall be assigned to each site for ongoing support to teachers and relevant staff. The plan shall also describe who provides supervision to trainers. If a coaching model is used, with the offeror working directly with local coaches who in turn work with teachers, the requirements for coaches and how the offeror will work with coaches must be described. The draft plan shall be submitted by February 22, 2019. The study team will provide comments on the plan within four weeks. The offeror shall revise the plan to reflect comments and indicate the specific dates or date ranges and which staff will conduct each training once the locations of the study districts and number of treatment teachers or relevant staff are known. The offeror must submit the final ongoing support plan to the study team by June 14, 2019. Should the offeror wish to make revisions to this plan during the implementation year, they shall submit the revisions to the study

team no less than one month in advance of the activities and must receive approval for the changes from the study team.

Deliverables: Draft ongoing implementation support plan
Final ongoing implementation support plan

Task 5. Provide initial training (July 2019 – September 2019)

The offeror shall conduct initial formal group training as indicated in the group training plan approved in Task 4.1. The offeror shall submit copies of all training agendas and materials to the study team at least one week prior to the start of training. Study team staff will observe formal group training sessions, track attendance, complete fidelity measures, and provide logistical support before and during the sessions. This task includes all initial group trainings required by the intervention program. If the selected intervention program uses a model that includes a separate training for school or district staff who will serve as coaches, the offeror must also provide these trainings. Within one week of each initial group training, the offeror shall provide the study team with a summary that includes a list of which individuals successfully completed the training.

Deliverables: Initial training agendas and materials
Summaries of initial trainings

Task 6. Provide ongoing implementation support (October 2019 – June 2020)

The offeror shall conduct ongoing implementation support throughout the implementation year (2019-2020) as indicated in the ongoing implementation support plan (Task 4.2). The offeror shall submit copies of all training agendas and materials to the study team on a timeline mutually agreed upon by offeror and study team. As part of providing ongoing support (e.g., coaching, webinars, small group discussions, classroom observations), the offeror shall complete monthly web-based logs developed by the study team to document each contact with teachers. The offeror may have a web-based log system of its own that would address this evaluation requirement. If so, the offeror may propose to provide information from such an existing data system. In that case, the offeror must include a description of this system and the data elements it collects in the proposal. At a minimum, the study will require information about the planned dates for support sessions, actual dates on which the support occurred, which teachers and staff or group of teachers and staff participated, the length of each session, topics of each session, next steps identified during each session, and barriers to and factors supporting implementation.

Deliverables: Ongoing support agendas and materials
Complete logs to document provision of ongoing support

B.2. Statement of Work for Optional Period 2 (Award expected 5/1/2020)

Period 2 activities are an option to the subcontract that may be funded at the discretion of IES. These tasks are for a second year of implementation of the intervention, if the offeror deems that a second year is necessary to achieve fidelity implementation and impacts on children. These tasks should be budgeted separately from Period 1.

Task 7. Project management (June 2020 – June 2021)**Task 7.1. Periodic calls with study team**

The offeror shall participate in regularly scheduled telephone meetings with the study team to support effective planning, implementation, and compliance with study reporting requirements. During these calls, the offeror shall: (1) share training and ongoing support plans, (2) identify implementation challenges and approaches to resolve them, (3) identify any deviations from expected implementation, and (4) present issues or questions requiring feedback/guidance from the study team. The meetings will be weekly throughout the implementation period. The offeror shall submit an agenda for each call to the study team at least one day prior to the call. The offeror shall create a summary of discussions that arose during the call and submit the summary to the study team within two days following each call.

Deliverables: Call agenda
Periodic meeting summaries

Task 7.2. Monthly progress reports

The offeror shall submit monthly progress/exception reports with their invoices to the study team by the 16th day of the month for work completed the prior month. These reports must (1) summarize the major activities and accomplishments of the previous month, comparing progress with the planned schedule and describing any problems encountered; (2) describe activities planned for the next month; (3) identify any significant deviations from the implementation plan as well as any anticipated issues; (4) describe plans for addressing any exceptions to the implementation plan; and (5) outline any decisions that may be needed from the study team or ED. Upon award, the study team will provide more information on the required format for the monthly progress/exception reports.

Deliverables: Monthly progress reports

Task 8. Provide initial training (July 2020 – September 2021)

The offeror shall conduct initial formal group training as indicated in the group training plan approved in Task 4.1. The offeror shall submit copies of all training agendas and materials to the study team at least one week prior to the start of training. Study team staff will observe formal group training sessions, track attendance, complete fidelity measures, and provide logistical support before and during the sessions. This task includes all initial group trainings required by the intervention program. If the selected intervention program uses a model that includes a separate training for school or district staff who will serve as coaches, the offeror must also provide these trainings. Within one week of each initial group training, the offeror shall provide the study team with a summary that includes a list of which individuals successfully completed the training.

Deliverables: Initial training agendas and materials
Summaries of initial trainings

Task 9. Provide ongoing implementation support (October 2020 – June 2021)

The offeror shall conduct ongoing implementation support throughout the implementation year (year 2020-2021) as indicated in the ongoing implementation support plan (Task 4.2). The offeror shall submit copies of all training agendas and materials to the study team on a timeline mutually agreed upon by offeror and study team. As part of providing ongoing support (e.g., coaching, webinars, small group discussions, classroom observations), the offeror shall complete monthly web-based logs developed by the study team to document each contact with teachers. The offeror may have a web-based log system of its own that would address this evaluation requirement. If so, the offeror may propose to provide information from such an existing data system. In that case, the offeror must include a description of this system and the data elements it collects in the proposal. At a minimum, the study will require information about the planned dates for support sessions, actual dates on which the support occurred, which teachers and staff or group of teachers and staff participated, the length of each session, topics of each session, next steps identified during each session, and barriers to and factors supporting implementation.

Deliverables: Ongoing support agendas and materials
Complete logs to document provision of ongoing support

B.3. Deliverables and Timeline

Exhibit 6 provides the schedule of deliverables and Exhibit 7 shows the timeline for project activities.

Exhibit 6. Schedule of deliverables

Task/subtask	Deliverable	Due date
Task 1. Communication with study team during period 1	1.1. Input on kickoff meeting agenda	Within 1 week of subcontract award
	1.1. Kickoff meeting summary	Within 2 weeks of kickoff meeting
	1.2. Call agendas	By the day before each call
	1.2. Periodic meeting summaries	Within 2 days of calls
	1.3 Attend technical work group meeting	Fall 2018
	1.4. Monthly progress reports	Monthly – 16th day of the month
Task 2. Site recruitment assistance	2. Brochure	Within 4 weeks of subcontract award
	2. Frequently asked questions document	Within 4 weeks of subcontract award
	2. Draft script for webinar	Within 4 weeks of subcontract award
	2. Final script for webinar	Within 2 weeks after receiving comments
	2. Recorded webinar presentation	Within 2 weeks after submitting final script
	2. Participate in recruiting calls (up to 20)	Ongoing October 2018 through May 2019
Task 3. Intervention program logic model, fidelity measures, and materials	3.1. Revised intervention program-specific logic model	Within 8 weeks of subcontract award
	3.1. Revised implementation fidelity measure	Within 20 weeks of subcontract award
	3.1. Final intervention program-specific logic model	Within 2 weeks after receiving comments
	3.1. Final implementation fidelity measure	Within 2 weeks after receiving comments
	3.2 Revised/draft training fidelity measure	Within 24 weeks of subcontract award
	3.2 Final training fidelity measure	December 15, 2018
	3.3. Draft intervention program materials	Within 24 weeks of subcontract award
	3.3. Final intervention program materials	December 15, 2018
Task 4. Training and ongoing support plan	4.1. Draft initial training plan	February 16, 2019
	4.1. Final initial training plan	May 15, 2019
	4.2. Draft ongoing support plan	February 22, 2019
	4.2. Final ongoing support plan	May 15, 2019
Task 5. Provide initial training	5. Initial training agendas and materials	1 week prior to each session
	5. Summaries of initial trainings	Within 1 week of each initial training
Task 6. Provide ongoing implementation	6. Ongoing support agendas and materials	June 14, 2019
	6. Complete logs to document provision of ongoing support	TBD/throughout implementation school year
Period 2 tasks		
Task 7. Project management during period 2	7.1. Call agendas	By the day before each call
	7.1. Periodic meeting summaries	Within 2 days of calls
	7.2. Monthly progress reports	Monthly – 16th day of the month
Task 8. Provide refresher training year 2 implementation	8. Refresher training agendas and materials	1 week prior to each session
	8. Summaries of refresher trainings	Within 1 week of each initial training
Task 9. Provide ongoing implementation support year 2	9. Ongoing support agendas and materials	TBD/throughout implementation school year
	9. Complete logs to document provision of ongoing support	TBD/throughout implementation school year

Exhibit 7. Project timeline, period 1

Task and deliverable	2018												2019												2020						Period 2 Implementation Year 2 (if proposed)
	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J						
1.1. Input on kickoff meeting agenda	✓																														
1.1. Kickoff meeting summary	✓																														
1.2. Call agendas	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
1.2. Periodic meeting summaries	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
1.3 Attend TWG meeting					(✓)																										
1.4. Monthly progress reports		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
2. Brochure	✓																														
2. Frequently asked questions	✓																														
2. Draft webinar script	✓																														
2. Final webinar script		✓																													
2. Recorded webinar presentation			✓																												
2. Participate in recruiting calls																															
3.1. Revised logic model	✓																														
3.1. Revised impl. fidelity measure				✓																											
3.1. Final logic model			(✓)																												
3.1. Final impl. fidelity measure							(✓)																								
3.2. Draft training fidelity measure				✓																											
3.2. Final training fidelity measure							✓																								
3.3. Draft program materials				✓																											
3.3. Final program materials							✓																								
4.1. Draft initial training plan									✓																						
4.1. Final initial training plan											✓																				
4.2. Draft ongoing support plan									✓																						
4.2. Final ongoing support plan											✓																				
5. Initial training agendas, materials															✓	✓															
5. Summaries of initial trainings																✓															
6. Ongoing support agendas, materials																															
6. Logs documenting ongoing support																✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
7.1. Periodic meeting summaries																															
7.2. Monthly progress reports																															
8. Refresher training agendas/materials																															
8. Summaries of refresher trainings																															
9. Ongoing support agendas, materials																															
9. Logs documenting ongoing support																															

✓ = deliverable due; (✓) = approximate due date; TWG = technical work group

Note: Tasks 7 through 9 in Period 2 will follow the same timing as the analogous tasks in Period 1 (Tasks 1.2, 1.3, 5, and 6) but in the following year (2020 or 2021).

C. PROPOSAL REQUIREMENTS AND REVIEW PROCESS

C.1. General Instructions

Offerors are encouraged to submit their best offer, as they may not have an opportunity to revise their proposal, and awards may be made without discussion. Each offer must consist of **two separate volumes**: a technical proposal and a business proposal. The technical proposal must not refer to pricing data.

The offeror must include enough detail in the technical proposal so that an expert review panel can effectively assess the offeror's proposal against the criteria in Exhibit 8. Proposals that simply restate the requirements of this RFP will not be considered.

Sections C.4 and C.5 describe the technical and business proposal requirements in detail.

C.1.1. Offeror Questions

A copy of this RFP is available online at <http://www.mathematica-mpr.com/our-publications-and-findings/projects/evaluation-of-preschool-special-education-practices>.

Offerors may send questions regarding this RFP to the study team at EPSEPcompetition@mathematica-mpr.com. The study team will respond to questions received from offerors by **5:00 p.m. Eastern Standard Time on January 18, 2018**. The study team will provide written responses no later than January 25, 2018 online at <http://www.mathematica-mpr.com/our-publications-and-findings/projects/evaluation-of-preschool-special-education-practices>. Submitting questions represents an opportunity for offerors to clarify information; however, there is no requirement to submit questions.

C.1.2. Proposal submission

Electronic versions of the technical and business proposals must be submitted no later than **5:00 p.m. Eastern Standard Time on February 26, 2018**. An Excel version of the budget templates (Attachment B) should be submitted separately as well. The electronic copy of the proposal (technical and business) must be emailed to EPSEP Competition at the following address: EPSEPcompetition@mathematica-mpr.com.

The anticipated award date is May 30, 2018.

C.1.3. Minimum qualifications

Only complete proposals received by **5:00 p.m. Eastern Standard Time on February 26, 2018**, will be reviewed. Proposals that do not include all of the requested technical and financial information may not be considered.

C.1.4. Amendment of the RFP

Mathematica may amend this RFP as necessary. All amendments will be posted on the RFP webpage address. It is the offeror's duty to check the RFP webpage for any amendments and new postings.

C.2. Proposal Review Process and Criteria

Mathematica will evaluate proposals submitted in response to this RFP and plans to award a Firm Fixed Price Subcontract (with cost reimbursement for travel) to the qualified Offeror whose proposal represents the best value to Mathematica, in consultation with our partners and IES.

C.2.1. Review process

Proposals will undergo a three-stage review process. In the first stage, the study team will review proposals to ensure that they are complete and meet the stated minimum qualifications of the RFP with respect to technical and budget material. We will also make a responsibility determination for each Offeror. Offerors who are not deemed responsible (based on the Offeror's responses in the responsibility determination form and Conflict of Interest Certification in Attachment C) or whose proposals fail to meet the minimum qualification may be eliminated from further consideration.

In the second stage, based on the criteria shown in Exhibit 8 below, an expert review panel will review all complete proposals and recommend up to four proposals for final consideration.

In the third stage, the finalists shall provide written responses to questions and oral presentations, after which the expert review panel will make a final recommendation. The in-person presentations will occur in Washington, DC, and the study team will cover travel costs for up to two staff members from each finalist. The study team will make the final selection in consultation with IES and the expert review panel.

Prices will be evaluated for congruence with the quality of the proposed work, as long as the total budget is within the resources allocated for this scope of work. There is a maximum of \$435,000 for the first year of implementation, and if proposed, \$290,000 for the second year (\$725,000 in total). Strong proposals must have a realistic budget for each of the tasks, with a detailed budget justification.

The technical factors, when combined, are more important than price. In analyzing proposals for this procurement, the offeror with the best combination of technical merit and price will be selected.

C.2.2. Technical proposal review criteria

Technical proposals that meet minimum requirements will be evaluated against the criteria specified in Exhibit 8. Each proposal will be evaluated on each established criterion as indicated, and will be scored up to a maximum total of 100 points. See Section C.4.2 for instructions on technical proposal content and organization requirements.

Exhibit 8. Technical proposal review criteria

Criteria	Description	Review Questions/Instructions	Points
<p>Quality, clarity, specificity, and suitability of proposed intervention program logic model</p>	<p>The extent to which the proposal articulates the logic model of the proposed intervention program with enough clarity and specificity for reviewers to understand the knowledge required by teachers and classroom instructional content and activities and to assess the adequacy of the intervention program in terms of how it will impact child language, literacy and social-emotional outcomes.</p>	<p>Does the logic model adequately describe the content, organization, duration, and intensity of the proposed intervention program’s key components and training/implementation support activities?</p> <p>Is the proposed content-specific curriculum focused on language, literacy, and/or social emotional domains and suitable for use by teachers in inclusive preschool classrooms in public schools and for children with disabilities and without disabilities?</p> <p>Are the proposed targeted instructional supports suitable for use by teachers in inclusive preschool classrooms in public schools for children with disabilities?</p> <p>Does the proposal demonstrate how the proposed targeted instructional supports will be integrated with the proposed content-specific curriculum?</p> <p>Is the logic model’s theoretical basis and description of causal mechanisms by which the proposed intervention program will provide teachers with adequate knowledge and improve language, literacy, and social-emotional outcomes for children with and without disabilities convincing?</p> <p>Can the proposed intervention program be feasibly integrated into inclusive preschool classroom activities (e.g., reasonable amount of instructional time, technology requirements, curricular materials, IEP requirements)?</p> <p>Are the proposed training/ongoing implementation support activities feasible within potential school constraints (e.g., teachers’ schedules)?</p> <p>Has the proposed intervention program been implemented with adequate fidelity previously? Has the offeror provided training and implementation support on the proposed intervention program previously? On what scale? With what fidelity have teachers implemented the intervention program to students? With what staffing commitment?</p> <p>Does the offeror provide an adequate plan for monitoring implementation fidelity and mitigating implementation challenges?</p>	<p>40</p>
<p>Qualifications and Capacity</p>	<p>The extent to which the proposal demonstrates the offeror’s experience providing similar training/implementation support in schools and the capacity and qualifications to perform the tasks in the</p>	<p>Does the offeror employ (or have a credible plan to hire) a sufficient number of staff to provide consistent training and ongoing support within the timeframe required by the study for approximately 40 teachers in 13 schools in 3 districts located across the U.S.?</p> <p>Will the offeror’s capacity also address provision of training and ongoing support at the scale</p>	<p>30</p>

Criteria	Description	Review Questions/Instructions	Points
	statement of work at the scale required by this study.	<p>required for the potential large-scale impact study?</p> <p>Do the qualifications and experience of proposed staff (or minimum qualifications for staff the offeror plans to hire) match their proposed responsibilities?</p> <p>Is the time commitment of proposed staff adequate for their proposed work?</p>	
Strength of evidence of efficacy/effectiveness	The extent to which relevant evidence supports the impact of the proposed intervention program on language, literacy, social-emotional and/or behavioral outcomes for preschool children with disabilities and without disabilities.	<p>Are the studies cited in the proposal relevant to the proposed intervention program (do they assess the impact of the intervention program being proposed, or at least components of it)?</p> <p>Are the studies cited in the proposal relevant to the inclusive preschool classroom setting? To preschool children across disability types? To preschool children without disabilities?</p> <p>Do the studies cited in the proposal find statistically significant positive impacts on child outcomes? For what subgroups of children?</p> <p>NOTE: more points will be awarded to studies that meet WWC evidence standards without reservations than studies that meet with reservations. If an offeror cites only studies using designs that do not meet WWC standards, their proposal is eligible for a maximum of 10 points on this criterion.</p>	20
Management plan	The extent to which the offeror's plan is sufficient to successfully execute the tasks described in the statement of work with high quality, on time, and within budget.	<p>Does the proposal adequately address how the offeror plans to identify, communicate to Mathematica, and mitigate problems with the quality, timeliness, and cost of their work?</p> <p>For consortia, does the proposal clearly describe each organization's roles and responsibilities; plans for communicating, monitoring, managing, and ensuring quality across organizations.</p>	10

C.2.3. Business proposal review criteria

Costs will be evaluated for congruence with the quality of the proposed work. Strong proposals must have a realistic budget for each of the tasks, with a detailed budget justification.

C.3. Budget and Subcontract Structure

This study is funded by the U.S. Department of Education under Contract No. ED-IES-14-C-0001 (the Prime Contract). The successful offeror will be issued a subcontract by Mathematica that will incorporate the applicable provisions of the Prime Contract and Federal Acquisition Regulations (FAR) (Attachment D to this RFP). The subcontract will be structured as a firm fixed price subcontract, with payments tied to deliverables and cost reimbursement for travel. The maximum funding available for the proposed work is \$725,000 (with \$435,000 for the first implementation year and \$290,000 for the second implementation year).

The executed subcontract between Mathematica and the offeror will cover Period 1 of the project. Period 2 is an option that if exercised will fund a second year of implementation (IES will consider this if the offeror makes a case for needing a second year to achieve fidelity implementation and impacts (per their logic model).

C.4. Technical Proposal Requirements

C.4.1. General instructions

The technical proposal (text plus all figures, charts, tables, and diagrams) is limited to 30 single-sided pages, not including the title page and table of contents. Technical proposals must be created separately from business proposals. Specified appendices shall not count as part of the 30 pages. All text must be double-spaced, 12-point Times New Roman font with standard character spacing; exhibits can use 10-point Times New Roman (or larger) font, but shall remain clear and easy to read. Pages shall be 8.5 by 11 inches, with a 1-inch margin along all four sides. Page numbers must be included. Any materials submitted outside of the 30-page limit (other than the exceptions noted) will not be reviewed.

C.4.2. Content and organization of technical proposal

Reviewers will rely on the information offerors provide in the technical proposal to award points on the technical proposal review criteria in Exhibit 8. The technical proposal shall include the following content and be organized into the following sections:

- **Title page.** Include the name of the offeror and intervention program; the name, title, and contact information of the proposal author(s); and contact information for a person with authority to negotiate for the offeror (for consortia, identify one of the organizations as the lead or primary contact).
- **Table of contents.** Identify the location and author(s) of each section of the proposal.
- **Introduction.** Briefly summarize the offeror’s approach and understanding of the evaluation’s goals. For consortia, include a short description of how the organizations will be organized and integrated to provide a consistent approach.
- **Description of the proposed intervention program.** Provide a logic model for the proposed intervention program. The logic model must clearly articulate what the proposed intervention program is, what it looks like in practice, who it is designed for, what outcomes it is designed to affect in the intermediate and longer term, and why and under what conditions it is expected to have those effects.

Logic model: Present the logic model in graphical/tabular and/or text form. Specify the following:

- The content, organization, duration, and intensity of the *key components* of the content-specific curriculum and targeted instructional supports. Key components are not the names of curricula or interventions or general principles. Rather, they are the “active ingredients” or resources the offeror hypothesizes are necessary for impacts on mediators and child outcomes. The offeror must specify key components that describe: what the teacher needs to know, what the teacher needs to do in the classroom, the

instructional strategies the teacher will use, and the expectations about students' participation including interactions with materials, other students, and the teacher.

- The content, organization, duration, and intensity of the *implementation supports* (initial training and ongoing supports) necessary for adequate training and implementation fidelity and who must be trained;
- The *target population* of children for whom the content-specific curriculum and targeted instructional supports were designed;
- The *mediating outcomes* or expected pathways through which the offeror hypothesizes impacts on child outcomes to occur;
- The *child outcomes* the program intervention program is designed and expected to impact; (The study team intends to select outcome measures that have both English and Spanish versions.)
- The *moderators* or contextual factors that are expected to moderate the intervention program's impact; and
- The specific *mechanisms of change* that describe the theoretical (and any empirical) basis for how the content, organization, duration, and intensity of the proposed intervention program and implementation supports impact mediators and child outcomes and the timeframe for achieving these impacts.

Suitability for and feasibility of use in EPSEP: Discuss the relevance of the proposed intervention program to the evaluation's logic model, target population and setting in Exhibit 1. Discuss the following:

- The appropriateness of the proposed content-specific curriculum for use in inclusive preschool classrooms and for children across all disability types and for children without disabilities
- The process that would be used to identify children with disabilities to receive the proposed targeted instructional supports in treatment and control classrooms and, if not appropriate for all children with disabilities likely to be in study classrooms, an estimate of the proportion of those children (the study team expects approximately 4 children with disabilities per study classroom) that will be targeted
- The appropriateness of the proposed targeted instructional supports for use in inclusive preschool classrooms
- The suitability of the proposed intervention program for English language learners
- The feasibility of integrating the proposed intervention program into existing inclusive preschool classroom schedules and activities, curricular materials, and IEP requirements.
- The feasibility of implementing the proposed implementation supports within school constraints such as staff qualifications required to implement the proposed intervention program, staff schedules and other responsibilities.

- Any adaptations to the proposed intervention program or implementation supports necessary to align with the requirements of this evaluation and the amount of time required to complete these adaptations.

Implementation Fidelity: Discuss the alignment of the proposed content-specific curriculum and targeted instructional supports, previous implementation experience, and the proposed implementation support plan. Specify the following:

- Whether, when, and in what settings the proposed content-specific curriculum and targeted instructional supports have been implemented together previously.
 - Any adaptations to the proposed content-specific curriculum, targeted instructional supports, or implementation supports necessary to integrate them into a coherent intervention program, if not implemented together previously, and the amount of time required to complete these adaptations.
 - The fidelity of any previous implementations of the proposed content-specific curriculum in school settings, whether adequate fidelity was achieved, and the length of time necessary to reach adequate fidelity.
 - The fidelity of previous implementations of the proposed targeted instructional supports in school settings, whether adequate fidelity was achieved, and the length of time necessary to reach adequate fidelity.
 - Whether the proposed implementation support plan deviates from the support provided in previous implementations and why.
 - The format (e.g., time interval observation by coach, teacher self-report checklist), data collection length and frequency (e.g., monthly, once per unit), specific foci or targets, and required data collector qualifications and training, and interrater reliability information for the offeror's tool to measure implementation fidelity.
 - Discuss fidelity both in terms of teacher training fidelity (what are the critical elements that must be included in the training and whether a training fidelity measure exists), and in terms of implementation fidelity by the teachers in classrooms (what are the critical elements of teacher activities to measure, what measure of implementation fidelity exists, and what are the thresholds that define adequate (or different levels of) implementation fidelity).
- **Statement of work.** Provide a clear and complete discussion of how each task outlined in Section B.1 of this RFP will be completed, including a discussion of potential challenges and proposed solutions and support with examples of materials in Appendix A as necessary to demonstrate the quality of the activities and plans.

Implementation Training and Ongoing Support Plan: For the initial training in summer 2019, the study team anticipates conducting three district level trainings with approximately 30-40 staff trained in each (assuming two teachers per classroom and one administrator per school). Provide the following about the proposed implementation support plan:

- The format and length (in hours and days) and number of the proposed initial trainings in summer 2019

- An assurance that the district-level trainings can be completed within the four weeks prior to the start of the school year in each district
 - The content and structure of the proposed initial training and the activities in which teachers will be engaged during the initial training.
 - The proposed schedule, format, and amount of ongoing implementation support the offeror will provide during the 2019-2020 school year
 - How the offeror will ensure training fidelity and consistency in initial training and ongoing support across offeror staff members and across school districts
 - How the offeror will monitor the delivery of training and support to determine if goals have been met and, if not, what activities will be used to remedy the problems.
 - How the offeror will monitor participant attendance and engagement in initial training and ongoing support, and how non-attendance will be handled.
 - How the offeror will identify when teachers have difficulties implementing the intervention program and how these difficulties will be addressed, including any proposed opportunities to provide teachers with feedback on their practices
 - A comparison of the implementation training and support plan being proposed with the training and support provided in prior successful implementations of the intervention program and rationale for any differences in the proposed plan
 - If the offeror proposes continuing implementation in the 2020-2021 school year, a plan for any refresher training in summer 2020 and ongoing support in 2020-2021
- **Evidence of efficacy/effectiveness.** Provide information about previous studies of the efficacy/effectiveness of the proposed intervention program (or key components of the intervention program). For each study:
- Provide the information requested in Attachment A (Exhibit A-1).
 - Provide the study rating for any studies that have been reviewed by the WWC⁹.
 - Provide citations for all research mentioned (and links to the research online, if available).

In addition, offers shall discuss what are the lessons learned from the prior research and how participation in EPSEP will build on the prior research.

- **Qualifications and capacity.** Document the qualifications and relevant experience of proposed staff and the capacity of the offeror to perform the tasks required in the statement of work at the scale required by this study

Staff qualifications and experience: Demonstrate the alignment between the qualifications and experience of proposed staff and their proposed responsibilities. Provide the following:

⁹ To determine whether a study has been reviewed by the WWC and has a rating already, check the WWC Database of Reviewed Studies: <http://ies.ed.gov/ncee/wwc/ReviewedStudies.aspx>

- Brief descriptions of the qualifications and experience of proposed personnel that is directly relevant to the task responsibilities they will assume under this subcontract
- Brief description of minimum qualifications that the offeror will require for any staff not currently employed by the offeror but needed to complete the tasks in the subcontract

Staffing plan and capacity: Provide the following:

- An organizational chart for all proposed staff (including staff and consultants) that identifies staff by name (if currently employed by the offeror), title, and proposed position/task responsibilities in the project's management structure.
 - The proposed number of hours for all proposed staff by task (both total and by year).
 - The proposed percent of time for all proposed staff by task (both total and by year).
 - The proposed percentage of time allocated to EPSEP and the percentage of time allocated to other work commitments for all proposed staff by year (including all contractual obligations). Please provide the template provided in Attachment A (Exhibit A-2).
 - Documentation that the offeror currently employs (or can hire and train) the number of qualified staff necessary to provide implementation supports at the level necessary for adequate implementation fidelity (for both the small-scale efficacy study and the potential large-scale impact study) within the timeframe required.
 - o The small-scale efficacy study is expected to involve 13 treatment schools (and 20 inclusive preschool classrooms in those schools) spread across 3 U.S. school districts. The large-scale efficacy study is expected to involve 54 treatment schools (and 108 inclusive preschool classrooms in those schools) spread across 12 U.S. school districts.
 - o The required timeframe to conduct initial training is within four weeks prior to the start of the school year. While school start dates may vary across participating districts, offerors must demonstrate capacity to complete initial training for all districts within four weeks of the start of the school year in each district.
 - How the offeror will provide consistent training across the schools and districts in the study, particularly if training activities must be conducted by different trainers concurrently in different districts.
 - Plan for hiring and preparing any new staff to be hired to complete subcontract tasks
- **Management plan.** Describe how the offeror will successfully execute the tasks described in the statement of work on time and within budget. Provide the following:
- Plan for identifying, communicating to Mathematica, and mitigating problems with the quality, timeliness, and cost of the work.
 - Description of the proposed lines of authority, coordination, and communication within the offeror organization, and between the offeror organization and the study team and the study sites.

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- For consortia, describe each organization's roles and responsibilities; plans for communicating, monitoring, managing, and ensuring quality and consistency across organizations; and any experience that the providers have working together.
 - Project management chart showing the timelines for all tasks and subtasks, with start and completion dates for each task, as well as intermediate dates for any precursor steps and draft deliverables.
- **Appendices.** The contents of the following appendices do not count against the 30 page limit for technical proposals.
- **Appendix A.** 1-2 page summary of intervention program; examples of products/materials associated with implementation of the proposed intervention program; tool for measuring implementation fidelity; suggested measures of key mediators or outcomes (if any).
 - Examples of products/materials associated with the implementation of the proposed intervention program, such as a scope and sequence document, implementation training and support materials, agendas, example lessons, and technology materials (tablets, internet access, etc.).
 - The implementation fidelity tool or tools used to capture how classroom teachers deliver instructional elements specific to the proposed intervention program. The study team will integrate some or all aspects of the tool for use in the evaluation by independent observers.
 - (OPTIONAL) A description of how the offeror measures mediators or outcomes that are critical to the logic model, and whether those measures have already been developed (or require minimal pilot testing) and are typically part of program implementation. Examples of such measures may include: (1) a measure for identifying children to receive the targeted instructional supports; (2) a measure of teachers' knowledge of the intervention program; or (3) a measure of the quality of inclusive preschool classrooms.
 - **Appendix B.** Previous research on the proposed intervention program (or its key components)
 - Relevant publications/reports for up to three of the studies included in the evidence reporting table (Table A-1).
 - Any relevant documentation for studies included in the evidence reporting table for which no publications are publicly available.
 - **Appendix C.** Resumes of up to three pages each for key proposed staff (management staff, trainers, and staff providing direct support to schools, as well as job posting or minimum qualifications documents as needed) that provide information on proposed staff members' prior experience relevant to their proposed role for this project (include a description of the work conducted, the recipient of the work, and the specific role the staff member played).
 - **Appendix D.** Organizational experience providing similar training and support in school districts; provide a list of districts or schools in which the offeror has provided training
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and support to implement the intervention program within the past three years (include description of the completed work, the duration and scope of the work, and the dates that work was completed); and provide contact information, as well as the number of schools and teachers with whom the offeror worked, for three recent clients. For consortia, each member organization must provide this information.

C.5. Business Proposal Requirements

C.5.1. General instructions

This project is funded by the U.S. Department of Education through Contract No. ED-IES-14-C-0001 with Mathematica (the Prime Contract). Mathematica will issue a subcontract to the successful offeror that will be governed by the applicable Federal Acquisition Regulations (FAR) and the required terms and conditions of the Prime Contract. The terms and conditions of the Prime Contract are appended to this RFP. The subcontract will be structured as a firm fixed-price subcontract (with payments tied to Mathematica's acceptance of deliverables). The maximum funding available for the proposed work is \$725,000 (\$435,000 for the first implementation year and \$290,000 for the second implementation year). The North American Industry Classification System (NAICS) code for this RFP is 611710- Educational Support Services.

The offeror's business proposal shall be consistent with the technical proposal with respect to the number of districts and schools estimated to participate in the study. The offeror shall propose to support implementation for:

- Study districts: 3
- Schools: 13
- Classrooms per school: 1.5
- Teachers per classroom: 2 (40 total)
- Children per classroom: 18 (4 with disabilities; while the intervention program will be implemented with all children in the classroom, we anticipate sampling 4 children without disabilities, thus collecting assessments for a total of approximately 8 children)

C.5.2. Content and organization of business proposal

The provider's business proposal **must** include the following information:

- **Organization's legal name, address; business point(s) of contact; TIN number, and DUNS number. Certification of cost pricing information as consistent with FAR**
- **An itemized budget by task, subtask, and by unit (school and teacher) for each period of performance, that the offeror anticipates to incur in performance of the Statement of Work.** The proposed budget shall use the templates provided in Attachment B to this RFP. The total costs shall include all of the tasks and deliverables described in this RFP, such as the salaries and expenses of trainers and other support staff; the development and printing costs of all materials and products used as part of implementation; the costs to ship materials to school districts; and costs for travel of trainers to training locations, including air, ground transportation, hotel, and meals. If ongoing support will involve travel to schools by developer staff, these travel costs shall also be included. The budget shall not include the costs for teacher honoraria, substitute teacher payments, training facilities, per diem or travel

costs for teachers or relevant school staff to attend training, or any wages for local district staff to provide on-site coaching (if a coaching or train-the-trainer model is proposed). If the offeror plans to hire coaches, these salaries shall be included in the budget. Materials costs should not be prohibitive for schools who may want to implement the intervention program in the future. The budget templates can be found online with the RFP:

<http://www.mathematica-mpr.com/our-publications-and-findings/projects/evaluation-of-preschool-special-education-practices>

- **Payment schedule.** Providers must provide a payment schedule based on the deliverables listed in Section B (see payment schedule template in Attachment B).
- **Budget narrative.** Provide a detailed budget narrative of all costs proposed. The narrative must be in sufficient detail to explain how all costs were derived. Proposals shall state that they remain valid for at least 120 days.
- **Business size self-certification form** signed by authorized firm's representative (Attachment C)
- **Certification Regarding Responsibility Matters form** signed by authorized firm's representative (Attachment C).
- **Conflict of Interest Certification form** signed by authorized firm's representative (Attachment C).

Providers shall organize their cost estimations according to the following major cost line items:

- **Direct labor.** Please provide project personnel salaries and wages only (include expenses for consultants under Other Direct Costs). For all personnel, provide the title, salary, and amount of time in hours that each person shall devote to the project. The rates to be supplied in the price proposal must not be loaded rates or average rates.
- **Fringe benefits.** Please provide estimated fringe benefit costs according to your most recent audited financial statements or Negotiated Indirect Cost Rate Agreement (NICRA). Include a copy of your most current NICRA. In absence of a negotiated rate agreement, the offeror shall justify the rates proposed.
- **Other direct costs.** Indicate all significant direct costs not covered by direct labor or fringe benefits. Examples are printing and reproduction, materials and supplies, facilities and equipment, consultants, outside services, postage and delivery, communications, and travel. If consultants are proposed, include on separate lines all consultant fees. Provide the name, rate, and level of effort for each proposed consultant, if known. If unknown, indicate to be added (TBA) in the budget and provide the estimated rate and level of effort.
- **Indirect costs.** Apply all applicable indirect costs according to your recovery practice. Please indicate whether you have an Indirect Cost Rate Agreement or a NICRA approved by the federal government. In absence of a negotiated rate agreement, the offeror shall justify the rates proposed.

- **Profit/Fee.** Offerors wishing to include profit/fee shall reflect it in a discrete budget line, which shall indicate the proposed percentage and calculated amounts for each task and aggregated total.

Mathematica reserves the right to request additional pricing information on all costs proposed and other documentation (such as a certificate of insurance, recent contract reference information, documentation of existing commitments, evidence of adequate business integrity, and personnel policies and procedures) before issuing any award. Applicable flow downs from the Prime Contract with ED and Mathematica's terms and conditions are included as Attachment D to this RFP.

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- Brown, W.H., H.T. Knopf, M.A. Conroy, H.S. Googe, and F. Greer. "Preschool Inclusion and Response to Intervention for Children with Disabilities. In *Handbook of Response to Intervention in Early Childhood*, edited by V. Buysse and E. Peisner-Feinberg (pp. 339–354), Baltimore, MD: Brookes Publishing Co., 2013.
- Division for Early Childhood. (2014). DEC recommended practices in early intervention/early childhood special education 2014. Retrieved from <http://www.dec-sped.org/recommendedpractices>.
- Horn, E., and R. Banerjee. "Understanding Curriculum Modifications and Embedded Learning Opportunities in the Context of Supporting All Children's Success." *Language, Speech, and Hearing Services in School*, vol. 40, 2009, pp. 406–415.
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- U.S. Department of Health and Human Services, and U.S. Department of Education. "Policy Statement on Inclusion of Children with Disabilities in Early Childhood Programs." Washington, DC: ED, HHS, 2015. <http://www2.ed.gov/policy/speced/guid/earlylearning/joint-statement-full-text.pdf>

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