

**Alternate School Year
Steering Committee**

**Phase I
Request for Proposals**

October 20, 2008

Alternate School Year Steering Committee

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Alternate School Year Steering Committee

Terms of Reference

1.0 PURPOSE OF CONSULTANCY

- 1.1 In general the consultant will facilitate the consultation needed in Phase I of the study, do any research required, and provide a report to be used in Phase II.
- 1.2 Phase I will focus on the research to clearly identify the benefits and identify the implementation challenges of an alternate school year in Northern Alberta. Phase I may be less detailed study than the Phase II study; however, the scope for Phase I needs to be large enough to understand the challenges. There needs to be sufficient consultation in Phase I to ensure there is a full understanding prior to considering Phase II.

2.0 BACKGROUND

- 2.1 Guiding Principles of the Study
 - 2.1.1 The academic school year shall be organized in a manner that seeks to provide an optimum of quality instructional time, maximizing contact time between teachers and students.
 - 2.1.2 Instruction and assessment cycles shall be organized in consideration of natural/traditional breaks in the calendar and seasonal or climatic factors that affect schools and students.
 - 2.1.3 The academic school year should provide maximum flexibility and opportunities for students to participate in educational programs offered by secondary and post-secondary institutions.
 - 2.1.4 The Academic school years for school jurisdictions within the same geographic community shall be common to all jurisdictions within that community.
 - 2.1.5 The Academic school years for neighboring school jurisdictions that share students and or services shall be common to each school jurisdiction.

- 2.1.6 The feasibility study shall invite input from all stakeholders and address key issues including additional costs in the first year of transition from the regular school year to the revised school year (i.e., a 13 month budget year), and the additional costs associated with the development, administration, scoring, and standard setting for Provincial Achievement Tests and Diploma Examinations.
 - 2.1.7 Obtain a legal opinion of the implications relating to changes to the school year and the transition on collective agreements, pension plans, regulations, and legislation
- 2.2 Expected Benefits of an Alternate School Year
- 2.2.1 Improve student learning outcomes by:
 - 2.2.1.1 minimizing the non-instructional time between instruction and assessment
 - 2.2.1.2 avoiding the less productive learning time in June that is associated with longer days
 - 2.2.1.3 maximizing the instructional time while minimizing the time spent on examinations.
 - 2.2.2 Improve transition rates between high schools and post-secondary institutions by:
 - 2.2.2.1 aligning the semester completion dates with those for entry into post secondary institutions; students would be able to complete grade 12 and enter a post secondary institution in January and September, thus creating two entry opportunities.
 - 2.2.2.2 aligning high school instructional schedules with those of post secondary institutions to increase the opportunity for students to be enrolled in high school and a post-secondary institution at the same time; this results in having students being able to explore post secondary courses and programs while enrolled in high school.
 - 2.2.2.3 aligning with post secondary institutions for a January transition will reduce the non-instructional time between secondary courses such as Physics 30 and Math 30 and college/university courses in the same

subject. This reduction in non-instructional time will ease the transition to post-secondary levels and reduce the learning regression that occurs when students experience large periods of non-instructional time.

2.2.3 Improved the level of safety offered by school authorities by:

2.2.3.1 avoiding the need to transport students to Diploma exams during the more severe weather conditions that often occur in northern areas in January.

3.0 SCOPE OF SERVICES FOR THE CONSULTANT(S)

3.1 Purpose of the Study

- 3.1.1 To develop an understanding of the effect that the school year has on academic achievement and transition rates from secondary to post-secondary levels.
- 3.1.2 To identify issues in Zone 1 relating to the implementation of an alternative school year that is aligned with post-secondary calendars.
- 3.1.3 To determine additional costs in the first year of transition from the regular school year to the revised school year (i.e., a 13 month budget year), and the additional costs associated with the development, administration, scoring, and standard setting for Provincial Achievement Tests and Diploma Examinations.
- 3.1.4 To identify alternatives and the related benefits, barriers and costs for each alternative.

3.2 Process

- 3.2.1 The researcher will be experienced in the collection and analysis of qualitative data, conducting a literature review, and general research processes.
- 3.2.2 Review of relevant literature. The researcher will compile and present a review of the literature relevant to alternate schools years to the steering committee. CASS Zone 1 is aware of an extensive literature review on alternate school years that was conducted by the Accountability and Reporting Division of Alberta Education. Access to the literature review and the key findings

will serve to inform subsequent actions in the study and to reduce overall costs of the study.

- 3.2.3 In consultation with the steering committee, the researcher will develop data collection strategies including:
- Interview guides
 - Survey instruments (if deemed necessary by steering committee)
 - Detailed work plan for the study
 - Project time line
- 3.2.4 Determine, in consultation with Alberta Education, ways by which the approximate costs of \$13 million for additional assessment instruments, scoring, and standard setting can be addressed.
- 3.2.5 Determine, through the literature review, how school jurisdictions have accommodated additional costs/ costs savings (opportunities) associated with the implementation of alternate school years (e.g., year-round schooling). Extensive use will be made of Alberta Education's literature review on this topic resulting in significant cost savings. In addition, the lead researcher will conduct interviews with the superintendents of those school jurisdictions in which alternate school years have been adopted to determine the effects of the alternate school year on budgets and budgeting, budget allocations, teacher contracts and collective agreements, calculating teacher service in light of requirements of the Teacher's Retirement Fund, and internal accounting procedures. School jurisdictions will specifically be asked to identify the ways by which additional costs were addressed in the existing budget allocation from Alberta Education.
- 3.2.6 Data gathering by the researcher using interviews with a representative sample from each of the stakeholder groups.
- 3.2.7 Analysis and follow up process by the researcher for clarification and elaboration in consultation with the steering committee. The researcher will clearly identify all opportunities, including fiscal opportunities, issues, benefits, constraints (e.g., funding for implementation of the alternate school year from local school board budgets without additional assistance from Alberta Education, costs for PAT and Diploma Examination development, scoring, and standard setting), and contingencies associated with the development and implementation of an alternate school year and propose courses of action that need to be considered and taken prior to proceeding to the next phase of the study.

- 3.2.8 Develop instruments and processes to secure stakeholder input in phase two of the study.
- 3.2.9 Prepare a final report concerning the purpose of the study and scope of work and present the findings and recommendations to ASBA Zone 1, CASS Zone 1 and ASOBA Zone 1 meeting.

3.3 Meetings

- 3.3.1 Monthly: Meet in-person with the steering committee monthly to review the progress on the project and seek guidance where needed. The consultant will be responsible for organizing meetings in consultation with the Secretary for the Committee. The Committee may waive a meeting if needed.
- 3.3.2 Weekly: Meet by telephone with the Committee Chair and to review the progress on the project and seek guidance where needed.
- 3.3.3 As Needed: Meet by telephone with the Treasurer to review budget and any other fiscal matters.
- 3.3.4 Project: Meet in-person with the ASBA Zone 1, CASS Zone 1, and ASBOA Zone 1 associations to present report and answer questions on the Phase I study.

4.0 DURATION

- 4.1 It is anticipated the work will be conducted over a period of four to five months, ending in March or April 2009.

5.0 DELIVERABLES

- 5.1 The Phase I consultant report should be presented to the committee in time to be built into the 2009/10 school jurisdiction operating budget. The consultant will be required to table the report by March 15, 2009.

6.0 ADDITIONAL INFORMATION

- 6.1 Firms are invited to submit a Technical Proposal and a Financial Proposal for consulting services required as specified in the Terms of Reference. The proposal will be the basis for contract negotiations and ultimately for a signed contract with the selected firm.

- 6.2 Please note that (a) the costs of preparing the proposal and of negotiating the contract, including a visit to the steering committee, are not reimbursable as a direct cost of the assignment; and (b) the steering committee is not bound to accept any of the proposals submitted

7.0 TECHNICAL PROPOSAL

- 7.1 In preparing the Technical Proposal, consultants are expected to examine the documents constituting this Request for Proposals in detail. Material deficiencies in providing the information requested may result in rejection of a proposal.
- 7.2 While preparing the Technical Proposal, consultants must give particular attention to the following:
- 7.2.1 If a consultant considers that it does not have all the expertise for the assignment, it may obtain a full range of expertise with individual consultant(s) and/or other firms or entities in a joint venture, as appropriate. Consultants may associate with the other consultants invited for this assignment only with the approval of the steering committee.
- 7.2.2 It is desirable that the majority of the key professional staff proposed be permanent employees of the consultant or have an extended or stable working relationship with it.
- 7.3 The Technical Proposal shall provide the following information:
- 7.3.1 A brief description of the consultant's organization and an outline of recent experience on assignments of a similar nature. For each assignment, the outline should indicate the profiles of the staff proposed, duration assignment, contract amount, and consultant's involvement.
- 7.3.2 Any comments or suggestions on the Terms of Reference and on the information, list of services, and facilities to be provided by the steering committee.
- 7.3.3 A description of the methodology and work plan for performing the assignment.
- 7.3.4 The management controls including steps that will be followed in reviewing staff work and the ways the steering committee will be kept informed of the progress of the work. The submission must be sufficiently detailed to permit an evaluation of the technical merits of the process.

- 7.3.5 The list of the proposed staff team by specialty, the tasks that would be assigned to each staff team member, and their timing.
 - 7.3.6 Curriculum Vitae for proposed professional staff, and the authorized representative submitting the proposal. Key information should include number of years working for the firm and degree of responsibility held in various assignments during the last eight years.
 - 7.3.7 Estimates of the totals staff input (professional and support, and staff time) needed to carry out the assignment, supported by a bar chart diagram showing the time proposed for each professional staff team member.
- 7.4 The Technical Proposal shall not include any financial information.

8.0 FINANCIAL PROPOSAL

- 8.1 In preparing the Financial Proposal, consultants are expected to take into account the requirements and conditions outlined in the RFP. The Financial Proposal should list all costs associated with the assignment, including (a) consultancy services, and (b) reimbursable expenses such as the subsistence, transportation, services and equipment. If appropriate, these costs should be broken down by activity.
- 8.2 Firms are required to express the price of their services in Canadian Dollars.
- 8.3 Proposals must remain valid 90 days after the date of submission.

9.0 SUBMISSION & MANAGEMENT OF PROPOSALS

- 9.1 The original proposal (Technical and Financial Proposals) shall be prepared in indelible ink. It shall contain no interlineations or overwriting, except as necessary to correct errors made by the firm itself. Any such corrections must be initialed by the persons or person who sign(s) the proposals.
- 9.2 For each proposal, the consultants shall prepare a covering letter. Consultants must submit an original and two (2) additional hard copies of each proposal along with one (1) CD copy. Each Technical Proposal and Financial Proposal shall be marked "ORIGINAL" and "COPY" as appropriate. If there are any discrepancies between the original and the copy of the proposal, the original governs.

- 9.3 The original and the copy of the Technical Proposal shall be placed in a sealed envelope clearly marked "TECHNICAL PROPOSAL" and the Financial Proposal in a sealed envelope marked "FINANCIAL PROPOSAL" with the warning "DO NOT OPEN WITH THE FINANCIAL PROPOSAL." Both envelopes shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address and be clearly marked, "DO NOT OPEN, EXCEPT IN PRESENCE OF STEERING COMMITTEE."
- 9.4 The completed Technical and Financial Proposals must be delivered at the submission address below on or before the time and date stated below. Any proposal received after the closing time for submission of proposals will not be accepted. Faxed submissions will not be accepted.
- 9.5 After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the steering committee or representatives. The Financial Proposal shall remain sealed and deposited in a safe location until all submitted proposals are publicly opened.

10.0 OPENING AND EVALUATION OF FINANCIAL PROPOSALS

- 10.1 The Financial Proposals shall be opened once the technical evaluation has been completed. The evaluation committee will determine whether the Financial Proposals are complete, and will correct any computational errors.

11.0 NEGOTIATIONS

- 11.1 Firms are advised that the steering committee is bound by the provisions of specific guidelines and procedures that govern the modalities under which payments can be made for the provision of products and services. The successful applicant will be required to enter into a contractual arrangement with the Peace River School Division #10 for the consultancy.
- 11.2 Negotiations shall be held at a place mutually suitable to both parties. The aim is to reach agreement on all points and sign a contract.
- 11.3 Negotiations will include a discussion of the Technical Proposal, the proposed methodology (work plan), staffing and any suggestions made by the firm to improve the Terms of Reference. The steering committee and the consultant will then work out the final Terms of Reference, staffing, activities, periods in the field and in the home office, logistics and reporting. The agreed work plan and final Terms of Reference will then be incorporated in the "Description of Services" and form part of the contract.

Special attention will be paid on getting the most the consultant can offer within the available budget and to clearly defining the inputs required from the steering committee to ensure satisfactory implementation of the assignment.

- 11.4 Having selected the firm on the basis of, among other things, an evaluation of the proposed key professional staff, the steering committee expects to negotiate a contract on the basis of the experts named in the proposal. Before contract negotiations, the steering committee will require assurances that the experts will be actually available. The steering committee will not consider substitutions during contract negotiations unless both parties agree that undue delay in the selection process makes such a substitution unavoidable or that such changes are critical to meet the objectives of the assignment.

12.0 SUBMISSION DATE

Applications must be received no later than Friday, November 7, 2008. Proposals are to be sent to Peace River School Division #10 Secretary-Treasurer, Mr. M. Peter Neale at email address nealep@prsd.ab.ca or postal address:

M. Peter Neale, Secretary-Treasurer
Alternate School Year Steering Committee
Peace River School Division #10
10018 – 101 Street
Peace River, AB T8S 2A5

Appendix: CASS Zone 1 Proposal for Feasibility Study (Cover)

March 26, 2008

Keray Henke
Deputy Minister of Education
7th Floor, Commerce Place
10155-102 Street
Edmonton, AB T5J 4L5

Dear Keray:

Thank you for agreeing to support Zone One's proposal to research the possibility of an alternative school year for Zone One. You identified an additional area that would require the proposed feasibility study to address. It's our belief that the attached submission addresses those concerns.

As part of the revision process, we also identified additional legal fees which consequently increased budget requests for Phase One to \$81 000.00. Also, please note that under this revised proposal, Zone One would agree to cover costs associated with Phase Two of the proposal and the wages and honorarium associated with its representation for Phase One and Two.

Sincerely,

Karl Germann

Karl Germann
CASS Zone 1 Chair

CC: Mr Terrence J. Wendel, Director, Zone 1 Services Branch

Encl.

Appendix: CASS Zone 1 Proposal for Feasibility Study (Page 1)



CASS Zone 1

c/o Grande Prairie & District Catholic Schools

Karl Germann, Chair

9902 – 101 Street

Grande Prairie, Ab T8V 2P4

(780) 532 – 3013 or (780) 518 3691 (cellular)

Alternative School Year Proposal for Feasibility Study

Background

On October 3, 2007, representatives from Zone 1 School Districts and Alberta Education met to discuss the possibility of changing the current school year to have semester one start in early August and end prior to the Christmas break. Semester two would start in January and end in early June. In addition, CASS Zone 1 discussed the matter at its February 22, 2008 meeting to address changes requested in the letter from the Deputy Minister dated February 7, 2008. This proposal addresses those changes and expands upon some key points in the original proposal.

Discussions at both CASS meetings identified the following reasons why the proposed alternate school year would enhance student learning and achievement:

- **Improve student learning outcomes by:**
 - minimizing the non-instructional time between instruction and assessment
 - avoiding the less productive learning time in June that is associated with longer days
 - maximizing the instructional time while minimizing the time spent on examinations.

- **Improve transition rates between high schools and post-secondary institutions by:**
 - aligning the semester completion dates with those for entry into post secondary institutions: students would be able to complete grade 12 and enter a post secondary institution in January and September, thus creating two entry opportunities.
 - aligning high school instructional schedules with those of post secondary institutions to increase the opportunity for students to be enrolled in high school and a post-secondary institution at the same time: this results in having students being able to explore post secondary courses and programs while enrolled in high school.

Appendix: CASS Zone 1 Proposal for Feasibility Study (Page 2)

- aligning with post secondary institutions for a January transition will reduce the non-instructional time between secondary courses such as Physics 30 and Math 30 and college/university courses in the same subject. This reduction in non-instructional time will ease the transition to post-secondary levels and reduce the learning regression that occurs when students experience large periods of non-instructional time.

- **Improved the level of safety offered by schools by:**

- avoiding the need to transport students to Diploma exams during the more severe weather conditions that often occur in northern areas in January.

Consequently, a consensus developed amongst CASS members at their October 4th meeting. The matter was then brought forward to the ASBA Zone 1 meeting held on November 22, where unanimous support was reached to advance the proposal to Alberta Education. Each Zone 1 Board subsequently passed a motion of support (see letters attached). CASS and ASBA Zone 1 believe there is sufficient benefit to Zone 1 students to justify a feasibility study regarding an alternative school calendar.

A CASS working committee met to identify the following guiding principles for the alternate school year calendar:

- The academic school year shall be organized in a manner that seeks to provide an optimum of quality instructional time, maximizing contact time between teachers and students.
- Instruction and assessment cycles shall be organized in consideration of natural/traditional breaks in the calendar and seasonal or climatic factors that affect schools and students.
- The academic school year should provide maximum flexibility and opportunities for students to participate in educational programs offered by secondary and post-secondary institutions.
- The Academic school years for school jurisdictions within the same geographic community shall be common to all jurisdictions within that community.
- The Academic school years for neighbouring school jurisdictions that share students and or services shall be common to each school jurisdiction.
- The feasibility study shall invite input from all stakeholders and address key issues including additional costs in the first year of transition from the regular school year to the revised school year (i.e., a 13 month budget year), and the additional costs associated with the development, administration, scoring, and standard setting for Provincial Achievement Tests and Diploma Examinations.

Appendix: CASS Zone 1 Proposal for Feasibility Study (Page 3)

- Obtain a legal opinion of the implications relating to changes to the school year and the transition on collective agreements, pension plans, regulations, and legislation

The Study-Phase One-The Issues Relating to an Alternative School Year in Zone 1

Purpose

- 1) To develop an understanding of the effect that the school year has on academic achievement and transition rates from secondary to post-secondary levels.
- 2) To identify issues in Zone 1 relating to the implementation of an alternative school year that is aligned with post-secondary calendars.
- 3) To determine additional costs in the first year of transition from the regular school year to the revised school year (i.e., a 13 month budget year), and the additional costs associated with the development, administration, scoring, and standard setting for Provincial Achievement Tests and Diploma Examinations.
- 4) To identify alternatives to deal with the additional costs.

Process

- 1) Establish a steering committee consisting of representation from each of the following groups:
 - CASS -Zone 1 (2 representatives)
 - ASBA-Zone 1 (2 representatives)
 - Alberta Education (3 representatives including one from the Governance Support Branch, one from Zone 1 Field Services Branch, and one from Learner Assessment)
 - The Alberta Home and School Councils Association (1 representative)
 - ASBOA- Zone 1 (2 representatives)
 - ATA Zone 1 (2 representatives)
 - Federal Schools within Zone 1 (1 representative)
- 2) The steering committee engages a researcher with the appropriate experience and expertise to address the purposes of the study. The researcher will be experienced in the collection and analysis of qualitative data, conducting a literature review, and general research processes.
- 3) Review of relevant literature. The researcher will compile and present a review of the literature relevant to alternate schools years to the steering committee. CASS Zone 1 is aware of an extensive literature review on alternate school years that was conducted by the Accountability and Reporting Division of Alberta

Appendix: CASS Zone 1 Proposal for Feasibility Study (Page 4)

Education. Access to the literature review and the key findings will serve to inform subsequent actions in the study and to reduce overall costs of the study.

- 4) In consultation with the steering committee, the researcher will develop data collection strategies including:
 - Interview guides
 - Survey instruments (if deemed necessary by steering committee)
 - Detailed work plan for the study
 - Project time line
- 5) Determine, in consultation with Alberta Education, ways by which the approximate costs of \$13 million for additional assessment instruments, scoring, and standard setting can be addressed.
- 6) Determine, through the literature review, how school jurisdictions have accommodated additional costs associated with the implementation of alternate school years (e.g., year-round schooling). Extensive use will be made of Alberta Education's literature review on this topic resulting in significant cost savings. In addition, the lead researcher will conduct interviews with the superintendents of those school jurisdictions in which alternate school years have been adopted to determine the effects of the alternate school year on budgets and budgeting, budget allocations, teacher contracts and collective agreements, calculating teacher service in light of requirements of the Teacher's Retirement Fund, and internal accounting procedures. School jurisdictions will specifically be asked to identify the ways by which additional costs were addressed in the existing budget allocation from Alberta Education.
- 7) Data gathering by the researcher using interviews with a representative sample from each of the stakeholder groups.
- 8) Analysis and follow up process by the researcher for clarification and elaboration in consultation with the steering committee. The researcher will clearly identify all issues, constraints (e.g., funding for implementation of the alternate school year from local school board budgets without additional assistance from Alberta Education, costs for PAT and Diploma Examination development, scoring, and standard setting), and contingencies associated with the development and implementation of an alternate school year and propose courses of action that need to be considered and taken prior to proceeding to the next phase of the study.
- 9) Develop instruments and processes to secure stakeholder input in phase two of the study.
- 10) Report findings and recommendations.
 - Report presented to ASBA Zone 1/ CASS Zone 1.

Appendix: CASS Zone 1 Proposal for Feasibility Study (Page 5)

Estimated Costs: Phase I

Project Task Areas	Expense Area	Cost per day	Total Costs
Steering Committee	10 meetings include room/ travel	\$2500	\$25,000
Researcher	Wages	\$600 at 50 days	\$30,000
	Expenses	\$200 est.	\$10,000
Legal Services		50 hours at \$200 per hour	\$10,000
Documentation Office Supplies and hosting			\$6000
Total Estimated Cost			\$81,000

In addition to the costs noted above, the costs associated with administration and board representation to the Steering Committee meetings will be addressed by each board paying expenses and honoraria for its representatives. This will represent Zone 1 jurisdictions' contribution to this study.

**Implementation-Phase Two: Addressing the Issues
Relating to an Alternative School Year in Zone One and
Consulting with Stakeholders**

Phase two would occur only if the interim report and the stakeholders, including Alberta Education, support the hypothesis that there is sufficient benefit to students to justify the implementation of an alternate school year and if strategies can be implemented to address issues, constraints, and contingencies. Implementation of phase two will see significant opportunity for involvement for all stakeholders and requires the creation and implementation of an effective communication plan to ensure that parents, teachers and students are aware of and have the opportunity to provide input on the proposed school year. Final costs estimates relating to this phase would be the responsibility of the Steering Committee established in Phase One.

Under the direction of the steering committee, the researcher would form a study/presentation team. Members of this team will have expertise in communicating with a large variety of stakeholders. This team's role would be to provide for face-to-face visits with teachers, parents and interested community members across Zone 1. The purpose of these meetings would be to communicate the perceived benefits of an alternative school year and to collect stakeholder concerns relating proposed school year

Appendix: CASS Zone 1 Proposal for Feasibility Study (Page 6)

changes. The team would collect and synthesize concerns so that these concerns could be discussed and addressed by the steering committee.

Estimated Costs: Phase II

Costs associated with Phase Two include:

Project Task Areas	Expense Area	Cost per day	Total Costs
Steering Committee	4 meetings include room/ travel		
Researcher	Wages	\$500	\$9000
	Expenses	\$200	\$1800
Team members	Wages	\$350	\$21000
	Expenses	\$200	\$12000
Communication	Information packages advertising		\$15000
Total			\$58800.00

COST APPORTIONMENT

A request for financial support in the amount of \$81,000 will be made to Alberta Education to fund both phases of the study. The remaining costs will be absorbed by Zone 1 school jurisdictions based on the percentage of students each board has of all students affected by the implementation of the alternate school year.