**RFP 22-71497**

**Attachment F: TECHNICAL PROPOSAL QUESTIONS - Detailed Scope of Services**

**Instructions:** The response must address all items detailed below and provide the information and documentation as required. The response must be structured to address each question listed below. A table of contents (see “2. Table of Contents”) must also be completed as listed in this Attachment.

1. **General Component Questions**

|  |  |
| --- | --- |
| **SOW Section Reference** | **Response Area(s)** |
| **Section 2: Program Manager and Project Management Team** | The Respondent must provide a description regarding how it will meet and address the requirements shared in Section 2 from the Scope of Work document for this RFP. |
| **Section 3: Project Plans and Schedules** | The Respondent must provide a description regarding how it will meet and address the requirements shared in Section 3 from the Scope of Work document for this RFP. |
| **Section 4: Project Meetings** | The Respondent must provide a description regarding how it will meet and address the requirements shared in Section 4 from the Scope of Work document for this RFP. |
| **Section 5: Timeline for Project** | The Respondent must provide a description regarding how it will meet and address the requirements shared in Section 5 from the Scope of Work document for this RFP. |
| **Section 6: Contractor Responsibilities/**  **Deliverables** | The Respondent must provide a description regarding how it will meet and address the requirements shared in Section 6 from the Scope of Work document for this RFP related to STEM (including but not limited to Procurement of Instruction Coaches, Training Requirements, and Monitoring & Oversight). |
| **Section 7: Expert Collaboration and Engagement** | The Respondent must provide a description regarding how it will meet and address the requirements shared in Section 8 from the Scope of Work document for this RFP. |
| **Section 8: Communication and Marketing** | The Respondent must provide a description regarding how it will meet and address the requirements shared in Section 9 from the Scope of Work document for this RFP. |
| **Section 9: Staff Qualifications** | The Respondent must provide a description regarding how it will meet and address the requirements shared in Section 10 from the Scope of Work document for this RFP. |

1. **Table of Contents**

**General Component Questions**

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**Section 2: Program Manager and Project Management Team**

CENTER OVERVIEW

* **Purpose:** The purpose of the Inclusive Equitable Practices Technical Assistance Center (IEP TA Center) is to increase knowledge, skills, and capacity of Indiana educators to improve outcomes for students with disabilities. The IEP TA Center promotes inclusive education with a belief in shared responsibility and equitable access to a strong core curriculum with high quality instruction benefitting all students.
* **Vision:** To bring inclusive equitable practices and high-quality instruction into all Indiana schools.
* **Mission:** To promote inclusive equitable practices for supporting all students.
* **Identify Core Team:** The Inclusive Equitable Practices Technical Assistance Center (IEP TA Center), formerly known as the Indiana IEP Resource Center, is comprised of a Leadership Team, Technical Assistance Specialists and Support Staff. See Appendix A for the IEP TA Center’s organizational chart.

LEADERSHIP TEAM

The IEP TA Center’s leadership team has a solid history of leading organizations and projects, working collaboratively with stakeholders, and effectively promoting positive change. All leadership team members have experience with managing complex projects that require supervision of staff, delegation of tasks, and management and oversight of details.

1. **Blumberg Center Director (.20 FTE):** Bruce Kulwicki will serve as the direct liaison between the IEP TA Center and the fiscal agent, Indiana State University (ISU). He will attend cabinet meetings at ISU, communicate with the Dean’s office, and serve as an advocate for the needs of the IEP TA Center to the university, community organizations, institutes of higher education, and other potential partners to support the work of the project. He will also be responsible for the supervision and evaluation of the IEP TA Center Project Director.
2. **IEP TA Center Project Director (1.0 FTE):** Jolly Piersall currently holds licenses as a director of special education and in the areas of learning disabled, general elementary, and mentally retarded (these areas were the current terms at the time of licensure). Jolly has a proven history of leadership of the Indiana IEP Resource Center (IEPRC) team for more than 12 years. She will have completed her PMP certification by the start of this project. She will serve as the primary contact with the IDOE and attend regularly scheduled meetings in order to ensure that the scope, schedule, and budget of the requested work is on track throughout the contract. It is recognized that changing needs of the state, districts, and schools become evident at different points throughout the year and that regular contact, collaboration, and data review will continuously guide the work.

Jolly is the direct supervisor for all other staff on the project. Staff meetings and check-ins will be used in order to provide supervision, to coordinate coaching and collaboration on various efforts, and to ensure that project deliverables are being addressed. Additionally, individual meetings are used to support the efforts and continuous professional development of all staff members.

Jolly has served as a collaborative member of the Indiana Resource Network (IRN). Historically, the IEPRC (now the IEP TA Center) has collaborated with other IRN staff in order to meet needs identified by the IDOE. Jolly will work with the identified subcontractors in order to enhance the efforts of core staff to meet the project deliverables. Jolly will assign technical assistance tasks for districts and schools to technical assistance specialists, subcontractors, and other staff based on expertise needed (as determined by the IEP TA Center and IDOE.)

1. **IEP TA Center Associate Director (1.0 FTE):** Marcee Wilburn is currently licensed as an elementary/intermediate generalist, as an elementary/primary generalist, in the area of math for grades 5-9, and in the area of mild intervention. Marcee has served in this role for six years. She will have completed her PMP certification by the start of this project. Marcee will regularly communicate with staff to ensure timely work completion and record keeping in a manner that facilitates readily generated status reports in order to ensure that IDOE has accurate access to information. She will provide information in a format and frequency agreed upon with the IDOE. This includes, but is not limited to, a quarterly executive summary of technical assistance and the year-end summary of work. Marcee will serve as a primary logistical coordinator for the state-level conference and regional trainings.

TECHNICAL ASSTANCE (TA) SPECIALISTS (1.0 FTE PER SPECIALIST)

All TA specialists will support schools and districts at the universal/general, targeted/specialized, and intensive/sustained levels. TA Specialists bring specialized expertise and knowledge useful in supporting schools and districts and are committed to ongoing professional learning. Staff will be assigned to tasks, schools, or districts based on expertise in specific areas that match school/district needs, geographic location in the state, and history and relationship with the school/district.

1. **Angela McKinney** is currently licensed as a school psychologist. She is a member of the current Facilitated IEP team. She will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related services providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to MTSS, training for Public Agency Representatives, goal writing and inclusive practices for speech language pathologists and related service providers, functional behavioral assessments, meeting evaluation and other timelines, co-teaching, supporting paraprofessionals, and effective case conference processes, as needs are identified collaboratively by the IDOE and IEP TA Center. She will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. She will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
2. **Matthew Johnson** is currently licensed in the areas of mildly mentally handicapped, learning disabled (these areas were the current terms at the time of licensure), and computers all at the K-12 level. He will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related service providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to writing IEPs, writing measurable IEP goals, progress monitoring, reporting, and training for administrators, as needs are identified collaboratively by the IDOE and IEP TA Center. Matt will provide regular, virtual support to educators by hosting monthly virtual office hours to support these topics. He will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. He will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
3. **Gail Ringwalt** is currently licensed in the areas of elementary administration and supervision, mentally retarded, seriously emotional handicapped, general elementary, and learning disabled (these areas were the current terms at the time of licensure). She is a member of the current Facilitated IEP team and serves as the primary coordinator for FIEP requests. She will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related services providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to effective case conference practices, inclusive practices, utilizing paraprofessionals, co-teaching, and including students in the IEP process, as needs are identified collaboratively by the IDOE and IEP TA Center. She will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. She will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
4. **Alisa Stovall** is currently licensed in the areas of director of exceptional needs, secondary administration and supervision, learning disabled, and seriously emotionally handicapped (these areas were the current terms at the time of licensure). She is a member of the current Facilitated IEP team. She will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related services providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to inclusive practices, MTSS, writing IEPs, writing measurable IEP goals, functional behavioral assessments, and behavior intervention plans, as needs are identified collaboratively by the IDOE and IEP TA Center. She will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. She will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
5. **Alana Harveth** is currently licensed in the areas of intense intervention and mild intervention. She is a member of the current Facilitated IEP team. She will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related services providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to co-teaching, inclusive practices, MTSS, writing IEPs, and writing measurable IEP goals, as needs are identified collaboratively by the IDOE and IEP TA Center. She will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. She will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
6. **John Purcell** is currently licensed in elementary administration and supervision and general elementary. He is a member of the current Facilitated IEP team. He will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related services providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to MTSS, inclusive practices, high leverage practices, and academic engagement, as needs are identified collaboratively by the IDOE and IEP TA Center. He will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. He will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
7. **Kathryn Mosley** is currently licensed as an English teacher for senior high - junior high/middle school. She is a member of the current Facilitated IEP team. She will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related services providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to inclusive practices, co-teaching, MTSS, and supporting behavior, as needs are identified collaboratively by the IDOE and IEP TA Center. She will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. She will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
8. **Jessica Binhack** is currently licensed as a mild intervention teacher and holds an initial practitioner license as an administrator. She is a member of the current Facilitated IEP team. She will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related services providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to co-teaching, inclusive practices, supporting behavior, MTSS, conducting functional behavioral assessments, writing behavior intervention plans, trauma-invested care, as needs are identified collaboratively by the IDOE and IEP TA Center. She will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. She will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.

SUPPORT STAFF

The IEP TA Center support staff have specialized training and skills required to perform complementary work that is essential to the overall goals and activities of the project. Support staff are committed to continued professional development to maintain current skills, learn about new technology needed to complete the work, and to remain on the cutting edge in their respective fields.

1. **Assistant Director of Digital Media and Operations (1.0 FTE):** Felicia Houston will provide accurate, accessible, and visually pleasing design work. This will include development of consistent formatting for handout templates. She will develop brochures and flyers to provide to districts, schools, and educational professionals to alert them to available resources and professional learning opportunities. She will develop and disseminate information via electronic newsletters and social media platforms (Facebook, Instagram, Twitter, and YouTube). She will develop a training catalog to provide information about professional learning and technical assistance via the website. Felicia will edit documents and information as needed to reflect current branding, to correct or update any information as needed, and to reflect any changes suggested and agreed on with the IDOE. She will photograph professional learning opportunity workshops, regional institutes, and a statewide conference.
2. **Technology Coordinator (1.0 FTE):** Mark Suiter will build and maintain a website of information, resources, and professional learning opportunities. The website will contain universal (Tier 1) resources to ensure that schools and districts have continuous, easy access to information. He will build and maintain a data collection system to record staff activities to ensure that project deliverables are met. He will ensure that a mechanism for collecting data on attendees at each professional development opportunity is in place. He will generate reports from this information to provide timely updates to IDOE. Mark will also provide technical assistance at larger events (e.g., the state-wide conference), during virtual learning events, and during hybrid events where synchronous learning is occurring across multiple formats. Mark will provide technical support to staff as needed to maintain and update necessary equipment (such as computers) and to maintain networking capability.
3. **Media Producer (1.0 FTE):** Dale Thomas will develop resources for dissemination in a variety of formats. Dale will provide audio/visual support to record and professionally edit video content/resources. He will ensure appropriate captioning to support accessibility. He will coordinate other AV support professionals at larger events (e.g., the state-wide conference) where concurrent sessions are happening. He will produce live, web streaming events that are delivered in a hybrid format where synchronous learning is occurring in multiple formats to accommodate educators that may have limited time and travel capability. He will work collaboratively with other Indiana Resource Centers to support media production and dissemination. He will maintain the YouTube channel dedicated to IEP TA Center content.
4. **Research Director (1.0 FTE):** Patrick McGinley will design evaluative measures to effectively assess outcomes of the project. He will consult with the IDOE as requested to analyze data to direct the focus of the work. He will provide data to TA Specialists to support technical assistance efforts and to help appropriately guide the focus of the work. He will disaggregate data to help identify patterns, particularly with marginalized populations to promote equitable inclusive practices. He will serve as a trainer for a variety of sessions to support educators, administrators, school psychologists, educational diagnosticians, speech language pathologists, related services providers, institutes of higher education, other educational staff, and parents. These may include but are not limited to data literacy, data-based decision making, and MTSS, as needs are identified collaboratively by the IDOE and IEP TA Center. He will also provide technical assistance to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. He will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
5. **Data Coordinator (1.0 FTE):** Rosalind Chandler will construct data reports to support schools and districts in improving their practices. She will provide data to TA Specialists to support technical assistance efforts and to help appropriately guide the focus of the work. She will disaggregate data to help identify patterns, particularly with marginalized populations to promote equitable inclusive practices. She will provide technical assistance to schools who need assistance with data literacy and utilization. She will provide TA to schools and districts identified by the IDOE to support improvement toward performance and compliance indicators, to support improvement efforts for ATSI and RDA, and to remedy complaints. She will provide technical assistance to promote equitable inclusive practices responsive to the needs of Indiana educators.
6. **Budget Operations Specialist (1.0 FTE):** Jenifer Pollom will manage the budget for the IEP TA Center. She will maintain documentation for all fiscal aspects of the project. She will manage training registrations, payments, invoices, and deposits. She will be responsible for monthly bill payments. She will assist in travel arrangements/details and process travel reimbursements for staff. She will work with human resources to manage staff salary and benefits. She will be responsible for ordering supplies and resources materials needed to accomplish project deliverables.

SUBCONTRACTORS

The IEP TA Center is committed to providing subcontracting opportunities for minority and women owned businesses. The expertise of the following two businesses is critical to the development of the IEP TA Center’s work and continued staff development.

**Virtuoso Education – Renae Azziz (3% - Woman Owned Business)**

External expertise will be needed in the area of cultural responsiveness. The IEP TA Center will subcontract with Virtuoso Education to ensure that the services and supports provided by the team are responsive to the diversity of the students served in Indiana. The scope of the work would include working with staff to support the development of equity-oriented mindsets and skillsets, to meet with staff to coordinate project activities, to review project tools and resources to ensure inclusion of an equity lens, and to collaborate with IEP TA Center staff to provide technical assistance across all tiers of support to identified schools and districts.

**Inclusion and Beyond, Inc. – Maura Robinson (2% - Minority Owned Business)**

It is critical that IEP TA Center staff continue to develop cultural responsiveness on an individual and collective level. The IEP TA Center will subcontract with Inclusion and Beyond, Inc. to work with and further develop our staff on recognizing implicit bias, eliminating microaggressions, and deepening awareness of different cultures. The work would include enhancing the IEP TA Center team’s ability to facilitate intercultural conflict.

**Narrative delineating the responsibilities and oversight by the primary contract**

The Project Director and/or Associate Director will assign specific tasks to the subcontractors, with clear expectations for timelines, data collection, and reporting. Subcontractors will provide a weekly summary of work to the IEP TA Center to ensure that project activities remain on time. Changes to assignments and tasks will be clearly communicated to the subcontractors as different needs are identified through collaboration between districts/schools, the IEP TA Center, and the IDOE.

**Section 3: Project Plans and Schedules**

The IEP TA Center will continuously monitor the ongoing operations of the project using a project plan and schedule. An annual updated project plan and schedule will be provided by the deadlines set forth by the IDOE. The IEP TA Center will ensure that IDOE has appropriate, frequent, direct, real-time access to the project plan and schedule which will reflect current and ongoing work. The proposed Master Project Plan reflecting the overarching scope of work and a specific schedule for each deliverable from October 1, 2022 - September 30, 2023 is provided below.

Master Project Plan & Schedules

The scope of work proposed by the IEP TA Center is outlined within the six deliverables noted below:

* Deliverable 1: Program Management
* Deliverable 2: Technical Assistance
* Deliverable 3: State-Level Conference
* Deliverable 4: Monitoring and Oversight
* Deliverable 5: Communication and Marketing
* Deliverable 6: Expert Collaboration and Engagement / Staff Development

Each of the deliverables has a corresponding project schedule noting durations, associated tasks, and the staff responsible for completion.

Deliverable 1: Program Management

|  |  |  |
| --- | --- | --- |
| Duration | Associated Tasks | Staff Responsible |
| Prior to October 1, 2022 | Develop a detailed project plan and schedule | Jolly Piersall & Marcee Wilburn |
| Prior to October 1, 2022 | Review feedback and update summary of key milestones and efforts to prepare for project kick-off meeting | Jolly Piersall & Marcee Wilburn |
| October 1, 2022 | Project kick-off meeting | Jolly Piersall & Marcee Wilburn |
| Prior to November 1, 2022 | Gain approval for templates associated with meeting agendas, project schedules, decision logs, risk logs and minutes | Marcee Wilburn |
| November 1, 2022 - Ongoing | Submit updated project schedules, decision logs, risk logs, minutes, and meeting recording within 24-48 hours of meeting. | Marcee Wilburn |
| December 15, 2022 | Deliver negotiated and final project plan | Jolly Piersall & Marcee Wilburn |

Deliverable 2: Technical Assistance

|  |  |  |
| --- | --- | --- |
| Duration | Associated Tasks | Staff Responsible |
| October 1 - 15, 2022 | Draft state level TA plan inclusive of regional trainings, material selection, in-district/virtual contacts and communications | Patrick McGinley & John Purcell |
| October 16 - 31, 2022 | Seek feedback and edit state level TA plan | Marcee Wilburn, Patrick McGinley & John Purcell |
| November 1, 2022 | Gain approval of state level TA plan | Jolly Piersall & Marcee Wilburn |
| Mid-November 2022 | Gain access to IDOE identified Level 2, Level 3 and Level 3+ districts | Jolly Piersall, Patrick McGinley & John Purcell |
| Mid-November 2022 | Determine appropriate TA Levels for voluntary LEAs and provide information to IDOE | Patrick McGinley & John Purcell |
| January 2023 | TA with identified and voluntary LEAs begins with regional trainings; materials will be provided | All IEP TA Center TA Specialists |
| January 2023 - Ongoing | Co-write LEA plans with districts and gain IDOE approval | All IEP TA Center TA Specialists |

Deliverable 3: State-Level Conference

|  |  |  |
| --- | --- | --- |
| Duration | Associated Tasks | Staff Responsible |
| Prior to January 13, 2023 | Schedule planning meeting with IDOE  Determine Theme  Select Potential Venues/Dates  Select Potential Speakers and Propose Topics | Jolly Piersall & Marcee Wilburn |
| January 2023 | Following IDOE approval:  Contact Venues & Complete Contract Process  Contact Speakers & Complete Agreement Process | Marcee Wilburn |
| February 2023 - March 2023 | Develop communication and marketing materials (i.e., communications, website posts, registration brochure) for state-level conference | Marcee Wilburn, Felicia Houston, Dale Thomas, and Mark Suiter |
| March 2023 | Open registration | Mark Suiter |
| March 2023 - mid September 2023 | Generate invoices for payment and input payments into database | Jenifer Pollom |
| March 2023 | Following IDOE approval:  Select and order resources and materials for conference dissemination | Marcee Wilburn |
| July 2023 | Collect and organize powerpoints and handouts for IDOE review | Marcee Wilburn |
| August - Mid- September 2023 | Conference Logistics:  Room sets/Audio Visual needs  Conference Materials:  Nametags, folders/packets, handouts, equipment, supplies, etc. | All IEP TA Center Staff |
| Mid-September 2023 | Host state-level conference | All IEP TA Center Staff |
| October 2023 | Compile evaluation results and disseminate | Gail Ringwalt |
| October 2023 | Email certificates of attendance | Mark Suiter |
| October 2023 | File completed training records (e.g., sign-in sheets, evaluation results, etc.) | Gail Ringwalt |

Deliverable 4: Oversight and Monitoring

|  |  |  |
| --- | --- | --- |
| Duration | Associated Tasks | Staff Responsible |
| Prior to October 1, 2022 | Develop and submit evaluations for IDOE approval | Gail Ringwalt |
| October 2022 - Ongoing | Provide and submit evaluation data for universal and customized trainings | All IEP TA Center TA Specialists |
| October 2022 - Ongoing | Input evaluation data for universal and customized trainings | Gail Ringwalt |
| January 2023 -Ongoing | Input TA efforts into reporting system for Level 2, 3, and 3+ | All IEP TA Center TA Specialists |
| April 1, 2023 | Provide an executive summary of TA efforts across LEAs | Prepared by Gail Ringwalt & Mark Suiter; Approved by Jolly Piersall and Marcee Wilburn |
| July 1, 2023 | Provide an executive summary of TA efforts across LEAs | Prepared by Gail Ringwalt & Mark Suiter; Approved by Jolly Piersall and Marcee Wilburn |
| October 1, 2023 | Provide an executive summary of TA efforts across LEAs | Prepared by Gail Ringwalt & Mark Suiter; Approved by Jolly Piersall and Marcee Wilburn |
| June 30, 2023 | Provide a year-end summary of accomplishments, value delivered and improvement opportunities. | Prepared by Gail Ringwalt & Mark Suiter; Approved by Jolly Piersall and Marcee Wilburn |

Deliverable 5: Communications and Marketing

|  |  |  |
| --- | --- | --- |
| Duration | Associated Tasks | Staff Responsible |
| October 1 - 31, 2022 | Develop and finalize the communication\* plan | Felicia Houston & Dale Thomas |
| November 1, 2022 | Gain approval of communication plan\* | Felicia Houston & Dale Thomas |

\*Refer to Section 8 for additional information and a copy of the proposed Marketing and Communications Plan.

Deliverable 6: Expert Collaboration and Engagement / Staff Development

|  |  |  |
| --- | --- | --- |
| Duration | Associated Tasks | Staff Responsible |
| Prior to October 2023 | Determine need and select expert collaborators who complement the work | Jolly Piersall |
| October 2023 | Initiate agreements including a SOW with expert collaborators & subcontractors | Jolly Piersall and Marcee Wilburn |
| October 2023 - Ongoing | Begin work with expert collaborators and subcontractors as defined within the agreements | All IEP TA Center Staff |
| October 2023 - Ongoing | Attend state and national professional learning opportunities; Following each event share out with others as appropriate | All IEP TA Center Staff |

Changes to the Master Project Plan and Schedules will be noted within the written documentation and in the weekly updates.

Documentation regarding any missed deadlines, litigation or breaches of contract will be disclosed to IDOE.

**Section 4: Project Meetings**

On an annual basis, the IEP TA Center will facilitate a Project Kickoff Meeting with the IDOE to review key milestones and efforts for the upcoming year and receive approval of the proposed Master Project Schedule.

Following internal weekly status meetings and/or report submissions, the IEP TA Center will provide weekly status reports each Thursday including but not limited to the following:

* Updated Project Schedule / Status of Ongoing Activities
  + Activities completed
  + Activities delayed
  + Timelines
* Updated Decision Action Log
  + Decisions made
  + Decisions pending
  + Decisions requiring contract amendment
* Risk/Issue Log
  + Associated Mitigations

The IEP TA Center will facilitate virtual bi-weekly status meetings with the IDOE. Meetings will address all aspects of the project. For each meeting, the IEP TA Center will provide the following within 24-hours:

* Meeting agenda
* Meeting recording
* Meeting minutes

A year-end summary report will be provided to IDOE documenting accomplishments, value delivered and improvement opportunities.

See Appendix B for the IEP TA Center’s Proposed Kick-off Meeting Agenda, Weekly Status Report, Bi-Weekly Status Meeting Agenda, Executive Summary of TA Efforts Across LEAs, and Year-End Summary Report Templates.

Additional planning meetings with IDOE and/or other collaborators may be warranted throughout the contract. Associated expenses are included within the proposed contract budget.

**Section 5: Timelines for Project**

The IEP TA Center recognizes that key timelines for deliverables are critical to cost and project completion.

Below is the proposed Project Timeline for 2022-2023. For more specific schedules for each deliverable see Section 3.

|  |  |  |
| --- | --- | --- |
| Duration | Deliverables | IEP TA Center Staff Responsible |
| October 1, 2022-  September 30, 2023 | Deliverable 1: Program Management | Project Director: Jolly Piersall  Associate Director: Marcee Wilburn |
| October 1, 2022-  September 30, 2023 | Deliverable 2: Technical Assistance | Level One Regional Sessions and Trainings Project Lead: Marcee Wilburn  Level Two Technical Assistance Project Lead: John Purcell  Level Three Technical Assistance Project Lead: Patrick McGinley  TA Providers: All IEP TA Center TA Specialists |
| January 2023 - September 2023 | Deliverable 3: State-Level Conference | Project Lead: Jolly Piersall  Event Logistics and Management: Marcee Wilburn  Event Support: All IEP TA Center Staff |
| October 1, 2022-  September 30, 2023 | Deliverable 4: Monitoring and Oversight | Project Leads: Jolly Piersall, Marcee Wilburn  Tracking of Training Participation & Completion: Mark Suiter & Rosalind Chandler  Monthly Reporting/Updates Lead: Gail Ringwalt  Monthly Reporting/Updates: All Staff  Site Visit Preparation, Monitoring, Accompanying Reports: All TA Specialists |
| October 1, 2022-  September 30, 2023 | Deliverable 5: Communications and Marketing | Project Leads: Felicia Houston & Dale Thomas  Project Support: Communication Committee |
| October 1, 2022-  September 30, 2023 | Deliverable 6: Expert Collaboration and Engagement / Staff Development | Project Lead: Jolly Piersall |

**Section 6: Contractor Responsibilities/Deliverables**

Since 2009, the Indiana IEP Resource Center (IEPRC), now the IEP TA Center, has been a project of Indiana State University’s Blumberg Center for Interdisciplinary Studies in Special Education, an established “Center of Excellence” in providing technical assistance statewide. The IEPRC has been a partner of the Indiana Department of Education (IDOE) as a member of the Indiana Resource Network (IRN) since its inception. The work of the Center has evolved overtime; however, the purpose of the work has always been to increase knowledge, skills, and capacity of Indiana educators to improve outcomes for students with disabilities. The IEP TA Center promotes inclusive education with a belief in shared responsibility and equitable access to a strong core curriculum with high quality instruction benefitting all students. IEP TA Center staff have experience developing and disseminating resources and materials, training and coaching individuals and teams, facilitating statewide and regional collaborative networks, and delivering intensive services and support to Indiana school districts.

The focus area of this contract is to support Individual Education Program (IEP) development and to provide Technical Assistance (TA).

The proposed IEP TA Center deliverables are aligned with the requests of the IDOE and are designed to support:

1. Writing all aspects of the IEP
2. Best practices in facilitating case conferences
3. Training and development of LEAs
4. Material and resource selection
5. Development of TA resources
6. Development and delivery of TA for equity-based inclusive practices
7. Delivery of TA for state-driven accountability systems
8. Research and evaluation of programs

Deliverable 1: Program Management

Jolly Piersall, Project Director and Marcee Wilburn, Associate Director will serve as the Program Management Team. In addition to leading the IEP TA Team, the Project Management Team will be responsible for the annual kick-off meeting, weekly status reports, bi-weekly status meetings, quarterly review of each executive summary of TA efforts and submission of the annual year-end summary report.

Program management includes the assurance of quality control. IEP TA Center staff will follow the internal review process outlined within Section 8 prior to posting for IDOE’s review.

Deliverable 2: Technical Assistance

For nearly ten years, the Indiana IEP Resource Center (IEPRC), now the IEP TA Center, has been recognized by the IDOE as the technical assistance provider for districts not meeting state targets for Least Restrictive Environment (LRE) and has been an available technical assistance partner for districts with needs identified through the Results Driven Accountability (RDA) system. Guided technical assistance has been offered to districts/schools identified as needing Additional Targeted Support and Improvement (ATSI) due to the underperformance of students identified as eligible for special education. Research supports equity-based inclusive education noting improved academic, behavioral and social-emotional outcomes for students with and without disabilities. When providing technical assistance in response to either IDOE or LEA requests, the IEPRC has utilized a strengths-based approach emphasizing the importance of data utilization, facilitating critical conversations, and promoting action items focused on evidence-based frameworks and practices aligned with the overarching goals of the district or school.

Within the current request, the IDOE defines technical assistance as the process of providing targeted support to an LEA with a development need or problem typically identified by the state-driven accountability system designed to comply with all federal requirements related to general supervision of compliance indicators, student outcomes, and providing support to LEAs in the provision of services.

The IEP TA Center would be responsible for delivery of technical assistance to districts and/or schools identified by the IDOE and those who choose to participate voluntarily. TA would include virtual or in-person conversations, virtual or in-person meetings, onsite school visits, coaching support, onsite workshops, and continual prescribed support to sustain efforts which mitigate or eliminate identified problems.

Similar to the work of the Office of Special Education Programs ([OSEP](http://www2.ed.gov/about/offices/list/osers/osep/index.html)): Results Driven Accountability (RDA), the proposed work of the IEP TA Center looks beyond compliance, placing emphasis on implementing best practices and improving student outcomes.

The following Core Principles aligned with the work of OSEP will guide the IEP TA Center’s work:

* **Principle 1:** Partnership with stakeholders
* **Principle 2:** Transparent and understandable to educators and families
* **Principle 3:** Drives improved results
* **Principle 4:** Protects children and families
* **Principle 5:** Differentiated incentives and supports to districts and schools
* **Principle 6:** Encourages districts and schools to target resources and reduces burden
* **Principle 7:** Responsive to needs

In addition to the Principles listed above and following the lead of the IDOE, the IEP TA Center will also utilize the CDC framework for Technical Assistance, a process of providing targeted support to an LEA with a development need or problem. This process is an effective method for building the capacity of an LEA by delivering TA aligned with a set of core principles over an extended period of time. TA provided by the IEP TA Center will reflect these principles:

* **Principle 1: Collaborative** – Work jointly with the organization’s staff to identify underlying needs.
* **Principle 2: Systematic** – Use an orderly approach.
* **Principle 3: Targeted** – Determine where technical assistance will have the greatest impact.
* **Principle 4: Adaptive** – Be flexible.
* **Principle 5: Customized** – Respond to the unique needs of the organization.
* **Principle 6: Results-driven** – Identify measures that indicate improvement.

The IEP TA Center has adopted a service model reflective of the Technical Assistance and Dissemination (TA & D) program through the United States Department of Education (USDOE). The service model provides three levels of technical assistance: universal, targeted and intensive.

* Universal, General Passive TA is information provided to independent users through their own initiative resulting in minimal interaction with TA Center staff. Universal support will reflect 10% of the IEP TA Center’s contracted efforts. Universal TA, or Level 1 TA, includes but is not limited to the following:
  + One-time, invited or offered conference presentations offered in a variety of formats (e.g., universal catalog trainings, customized in-district trainings, web-based training modules, institutes, etc.)
  + Information, resources or tools (e.g., informational brochures, training materials, guidance documents, social media posts, website downloads, etc.)
  + Brief communications directly with Indiana educators (e.g., telephone, email, etc.)
  + Facilitated IEP services
* Targeted, Specialized TA services are developed based on needs common to multiple recipients and not extensively individualized. A relationship will be established between the TA recipient and one or more TA Center staff. Targeted TA includes but is not limited to the following:
  + Level 2 TA with 80-100 LEAs identified by IDOE or at the request of the LEA
    - 20 direct contact hours/district (i.e., at least 10 hours onsite) for LEAs identified by IDOE
    - Direct contact hours will be at the discretion of the district if TA is requested by the LEA
    - The work of each identified or requested district will be defined within the LEA level plans
  + Topical Trainings (e.g., prescriptive trainings based on the needs of one or multiple recipients offered in a variety of formats)
  + Training Series (e.g., communities of practice, cohorts etc. offered in a variety of formats)
* Intensive, Sustained TA services are often provided on-site and require a stable, ongoing relationship between the TA Center staff and the TA recipient. Intensive TA includes but is not limited to:
  + Level 3 TA with 20-30 LEAs identified by IDOE
    - 30 direct contact hours/district (i.e., at least 20 hours onsite)
  + Level 3+ TA with 5-10 LEAs identified by IDOE
    - 40 direct contact hours/district (i.e., at least 30 hours onsite)

Level 3 and Level 3+ TA services are defined as a negotiated series of activities designed to reach a valued outcome. This category of TA should result in changes to policy, program, practice, or operations that support increased recipient capacity and/or improved outcomes at one or more systems levels. The work of each identified district will be defined within the LEA level plans and approved by the IDOE.

As noted, LEA level plans will be completed for districts identified as Level 2, 3, and 3+. All plans will be co-constructed by the IEP TA Center TA Specialists and the LEA and approved by IDOE. All plans will include but will not be limited to the following:

1. Identification of problem(s) or need(s)

* Use of needs assessment is allowable (when necessary) – tool must be approved prior to use

2. Goal setting

3. Embedded progress monitoring

4. Use of Evidence-based practices

5. Data collection procedures and practices

6. Communication plan

7. Activities designed to support sustainability

All identified Level 2, 3 and 3+ LEAs will sign an assurance agreement committing to the expectations and rules of engagement in the TA Process. Assurance agreements will include but are not limited to the following:

1. Parties involved- LEA(s), any and all Technical Assistance Centers

2. Identify level of TA, its objectives, expected outcomes, and activities

3. Timeline

4. Statement related to parties intended commitment

See Appendix C for the IEP TA Center’s LEA Level Plan Template and LEA Assurance Agreement.

Deliverable 3: State-Level Conference

For the past ten years, the Indiana IEP Resource Center, now the IEP TA Center, has hosted the Focus on Inclusion Conference, Indiana’s statewide conference on inclusive education for general educators, special educators and administrators. The initial conference hosted approximately 200 attendees, mostly special educators. The work of the Center has evolved overtime and the conference now attracts nearly 700 attendees reflecting an array of educators across the state. The conference consistently receives high marks from attendees and is often referenced as “the best professional learning opportunity”.

In collaboration with the IDOE, the IEP TA Center will choose a theme for the conference, select national experts for keynotes and concurrent sessions, and determine any resources and/or materials provided to conference attendees. All coordination efforts will be assumed by the IEP TA Center and will include but not be limited to the following:

* Securing a location
* Compiling line items for a working budget of up to $300,000
* Attaining conference presenters
* Presenter contracts
* Managing corresponding materials
* Marketing

See Appendix D for the IEP TA Center’s Past State-Level Conference Data.

Deliverable 4: Oversight and Monitoring

Oversight and monitoring are essential to ensure work is consistent and effective. The process for oversight and monitoring outlined below will capture the work of the IEP TA Center and the LEAs.

In a shared, accessible location, the IEP TA Center will provide detailed and accurate records to IDOE on a weekly basis including but not limited to the following:

* Attendance records
* Sign-in sheets
* Evaluation data

See Appendix E for the IEP TA Center’s Sign-in Sheet, Evaluation, and Evaluation Report Templates. Attendance records and sign-in sheets may also be exported from virtual platforms reflecting a spreadsheet and/or electronic sign-in.

In addition to the LEA level plan and assurance agreement, every LEA identified by IDOE as needing Level 2, 3 or 3+ TA will also have a monitoring plan that will be updated on a weekly basis and available in a shared, accessible location with IDOE. The monitoring plan will include but is not limited to the following:

* LEA site contacts and/or visits (e.g., frequency of contacts/visits, time allotments, formats, etc.)
* Timeline for coordinated feedback and summary documentation to IDOE
* An escalation protocol addressing concerns

See Appendix F for the IEP TA Center’s LEA Monitoring Plan Template.

Deliverable 5: Communications and Marketing

A well-thought plan for communication and marketing is essential to the success of the IEP TA Center. The Center will create, implement, and maintain a communication plan for the duration of the contract. The communication plan will specifically include, but is not limited to the following audiences:

* Level 2, 3 and 3+ LEAs identified by IDOE
* LEAs requesting TA
* Institutes of Higher Education (IHE)
* Other LEAs

Information included with the communication plan will include but is not limited to the following:

* IDOE quarterly newsletter submissions
* Messages and graphics for social media campaigns
* Video dissemination
* Recruitment efforts

All communication efforts will be transparent and inclusive of best practices.

Additional information regarding the communication plan can be found in Section 8 of the proposal. Additional information regarding communication specific to Level 2, 3 and 3+ LEAs will be included within the state level TA plan that is due November 2022 and reiterated in LEA level plans that will be co-created with LEAs starting in January 2023.

Deliverable 6: Expert Collaboration and Engagement / Staff Development

As noted within Section 9 of the proposal, the IEP TA Center staff offers an array of varied educational experiences, knowledge, and skills. However, there is always more to learn. It is imperative that IEP TA Center staff be on the cutting edge. To create opportunities for growth for staff, the IEP TA Center will collaborate with national experts in the field of education, specifically Dawn Miller, Associate Director of SWIFT Education Center and Julie Weatherly, Esq. Dawn Miller will provide additional training and guidance on providing effective technical assistance to guide the development of a MTSS framework to improve outcomes for students with disabilities. Julie Weatherly will ensure that staff are current in their understanding of federal and state law in regard to special education and will provide annual FIEP training. In addition to expert collaborators at the national level, the IEP TA Center will be teaming with two Indiana-based companies, Virtuoso Education Consulting, and Inclusion and Beyond, Inc. Equity needs to be at the forefront of our work. Both companies offer expertise in equitable practices and cultural responsiveness; however, the lens at which the work is done varies offering differing perspectives. Depending on the nature of the work, these subcontractors will work alongside the IEP TA Center staff to ensure that resources, materials, and direct services are both accessible and relatable to LEAs and the students and families with whom they serve.

Additional information on Expert Collaborators and Subcontractors can be found in Section 7 and Section 2, respectively.

In addition to partnering with educational leaders within the field, IEP TA Center staff will belong to state and national organizations and participate in state and national conferences and trainings aligned with their area of expertise. Affiliation with state and national organizations promotes networking among educators offering varying experiences and perspectives. Attendance at both state and national conferences ensures that staff have exposure to information and content that is research-based and proven effective within the current educational context. IEP TA Center staff will share newly acquired information, resources, and materials with colleagues at staff meetings and the information gained will inform their practice.

Partnerships and collaboration are emphasized within the guiding principles for providing TA by both OSEP and the CDC. Working with other entities to improve and/or promote the efforts of the IEP TA Center is encouraged. Potential collaborators may include but are not limited to the following:

* Arc of Indiana
* Council for Exceptional Children (CEC)
* Center for Education and Lifelong Learning
* CEC’s Division for Emotional and Behavioral Health
* Indiana Association of School Psychologists
* Indiana Council of Administrators in Special Education
* Indiana Council for Exceptional Children
* Indiana Institutes of Higher Education
  + Ball State University
  + Butler University
  + Grace College
  + Indiana State University
  + Indiana University Kokomo
  + Indiana University Purdue University Columbus
  + Indiana University Purdue University Indianapolis
  + Huntington University
  + Marian University
  + Purdue University Fort Wayne
  + Purdue University
  + Saint Mary-of-the-Woods College
  + University of Evansville
  + University of Indianapolis
  + University of Southern Indiana
  + Vincennes University
* IN\*SOURCE: Special Education Parent Support
* PATINS: [Promoting Achievement through Technology and INstruction for all Students](https://www.patinsproject.org/).

**Section 7: Expert Collaboration and Engagement**

Dawn Miller – District and Building Level Technical Assistance, MTSS

Julie Weatherly – Facilitated IEP Trainer

To remain on the cutting edge of best practices, the IEP TA Center staff participates in continued and deliberate professional learning. To create opportunities for growth for staff, the IEP TA Center will collaborate with national experts in the field of education, specifically Dawn Miller, Associate Director of SWIFT Education Center and Julie Weatherly, Esq.

Dawn Miller will provide additional training and guidance on providing effective technical assistance to guide the development of a MTSS framework to improve outcomes for all students, particularly with disabilities, and marginalized and minoritized populations. Dr. Miller is a known expert in the field and will help IEP TA Center staff to refine and add to current content and processes and ensure that the services and supports provided by our team are aligned with an equity-based approach engaging all students in learning to high expectations.

Julie Weatherly will ensure that staff are current in their understanding of federal and state law in regard to special education and will provide annual FIEP training to IEP TA Center TA Specialists. There is little formalized training available in facilitated IEPs, and the needs and issues observed at meetings over the last few years have notably intensified. Ms. Weatherly is a known expert in the field, bringing together facilitation techniques, best practices for meetings, and issues in special education law that must be considered to stay legally compliant and have positive meeting outcomes and encourage positive relationships between schools and families.

**Section 8: Communication and Marketing**

**Introduction:** The IEP TA Center’s marketing and communications plan is designed to create and implement marketing activities to increase educator training participation; inform those educators not directly involved with the IEP TA Center’s professional learning opportunities; build and disseminate training and resource materials; and enhance the awareness of the IEP TA Center through design, web, video, print, and newsletter and social media campaigns. This plan includes draft information for IDOE quarterly newsletters, messages and graphics for social media campaigns, and videos summarizing training efforts and/or means for additional recruitment anticipated once annually.

**Marketing and Communications Department:** The IEP TA Center’s Marketing and Communications Department consists of three team members, which covers the areas of newsletter and social media campaigns, design, video, web, print, and online. The Marketing and Communications Department has an Assistant Director of Digital Media and Operations (Felicia Houston), a Technology Coordinator (Mark Suiter), and a Media Producer (Dale Thomas). For more information regarding each position within this department and to view resumes, please visit Section 2: Program Manager and Project Management Team and Section 9: Staff Qualifications.

**Committee:** An internal marketing and communications committee will be created and meet monthly or bi-weekly, as needed, to discuss strategies, goals, progress, edits, and/or approvals. The committee will consist of 5 members, and each will play a vital role in the committee.

* Assistant Director of Digital Media and Operations - Felicia Houston
* Associate Director - Marcee Wilburn
* TA Specialist - Angela McKinney
* Technology Coordinator - Mark Suiter
* Media Producer - Dale Thomas

**Print Production Vendors:** The IEP TA Center will work with print production vendors to produce limited quantities of large scale and/or bulk items beyond the center’s print capabilities and/or above the fiscal agent’s (Indiana State University) purchasing department limits. The fiscal agent’s purchasing department requires a bidding process for each print production project above purchasing limits.

The print production vendors include, but are not limited to the following:

* World Arts, Inc. (156 East Franklin Street, Spencer, Indiana 47460)
* Dynamark Graphics Group Indy (7210 Zionsville Road, Indianapolis, Indiana 46268)

**Goals and Strategies:** The IEP TA Center will focus on a variety of goals and strategies to support the Center’s key messages. The marketing and communications plan will specifically include, but is not limited to the following goals and strategies:

1. Develop and implement marketing and communications activities to increase educator training registration and participation.
2. Rebrand and reimagine the center’s website and create a more accessible and user-friendly website.
3. Deliver online resources and materials to those educators not directly involved in virtual or in-person professional learning opportunities.

**Key Messages:** The marketing and communications plan will include a minimum of 3 key messages. Key messages included within the marketing and communications plan will include, but is not limited to the following messages:

1. To enhance inclusive and equitable comprehension and expertise of Indiana educators to support all students.
2. To advertise and raise awareness of upcoming professional learning opportunities for educators.
3. To inform educators, who are unable to participate in professional learning opportunities, how and where to access electronic resources and materials available through the IEP TA Center.

**Specific Audiences:** The marketing and communications plan will specifically include, but is not limited to the following audiences:

1. Level 2, 3, and 3+ LEAs identified by IDOE
2. LEAs requesting Technical Assistance (TA)
3. Institutes of Higher Education (IHE)
4. Other LEAs

**Media Methods:** Training and resource materials will be shared electronically for all events and technical assistance with the exception of the 2-day conference.

1. Publications and Design (examples listed below include both printed and digital projects)

* Event Flyers (2-day conference, Summer Institutes, Cohorts, webinar series, etc.)
* Banners (services available, training registration and information, contact information, etc.)
* Informational Brochures and Catalogs (services, service request information, training catalog, etc.)
* Programs (2-day conference)
* Signage (2-day conference)
* Logos
* Resource materials
* Training materials
* Folders

1. Web and Electronic

* Primary website
  + Training Catalog
  + Indiana Special Education Directory
  + Annual Report
  + Event flyers
  + Training Resources and Materials
    - Padlet
    - Moodle Self-paced Courses
* Secondary websites (IDOE, IN-CEC, CEC, PASS, Deaf/Blind, etc.)
* Social media platforms
  + Facebook
  + Instagram
  + Twitter
  + YouTube
    - Channel playlists or videos will be linked to primary website to increase online traffic/engagement
* Moodle Self-paced Courses
* Padlet
* IEP TA Center Insider newsletter
  + Weekly (or as needed) - upcoming training registration and information
  + Monthly Newsletter
    - The IEP TA Center Insider’s monthly newsletter will feature book and resource highlights, upcoming events, mental maintenance, insider spotlights, and more.

**Plan of Action:** This section includes strategies and guidelines for design and creativity, communications and marketing, website, and social media.

1. Design and Creativity Strategy:

* Design Guidelines
  + All communications and marketing materials will adhere to a design that provides consistency across materials and online platforms. The consistency of the IEP TA Center’s design branding will extend to print and electronic materials.
* Color Palette Guidelines
  + A specific color palette made up of approved color swatches will connect the creative strategy, visual identity, and official logo of the IEP TA Center.
* Font and Text Guidelines
  + Use real text rather than text within graphics
  + Select basic, simple, easily readable fonts
  + Use a limited number of fonts
  + Ensure sufficient contrast between the text and background
  + Avoid small font sizes
  + Limit the use of font variations such as bold, italics, and all caps
  + Avoid centered and justified text
  + Reserve underlined text for links only
  + Do not rely only on the appearance of the font (color, shape, variation, placement, etc.) to convey meaning
  + Avoid blinking or moving text

1. Marketing and Communications Strategy: The Inclusive Equitable Practices Technical Assistance Center will implement a marketing and communications strategy to maintain and facilitate communication about the center’s services and professional learning opportunities with specific audiences. Elements of the strategy will include the following:
2. Create and disseminate monthly IEP TA Center newsletters to internal mailing lists, the Blumberg Center at Indiana State University, the Indiana Resource Network, Indiana school districts, and higher education institutions
3. Produce and execute video highlights of successful in-district trainings, including district feedback, teacher impact, and student outcomes
4. Website Strategy: The IEP TA Center’s website serves as the center’s primary locus of information for Indiana’s General Educators, Special Educators, and Administrators. The IEP TA Center website will operate as an important marketing tool, since most advertising and communication efforts direct Indiana educators to the website.
5. Social Media Strategy: The IEP TA Center uses the most current and connected social media channels, such as Facebook, Instagram, Twitter, and YouTube to inform, interact, and engage with internal and external educational audiences.

**Integration Tools:** In an effort to implement a cohesive and consistent brand across the resource center, a variety of tools and guides will be developed. These tools will be accessible online via shared Dropbox for internal staff of the IEP TA Center.

1. Branding Guide
2. Font Accessibility Guide
3. Color and Contrast Accessibility Guide
4. Microsoft Office Accessibility Guide
5. Official logos, letterheads, labels, and/or PowerPoint/Word document templates

**Quality Control Responsibilities:** The IEP TA Center will apply quality control measures to ensure all documents, materials, reports, newsletters, postings, email communications, media files, etc. meet the high standards of the IDOE and are aligned with key messages. The quality control measures outlined below will ensure accurate and error-free documentation.

1. The IEP TA Center staff will utilize current references to ensure information is accurate and up to date. In addition, staff will develop all materials utilizing built-in review tools to reduce the number of errors and utilize the guidelines to promote accessibility of all materials.
2. The draft will then go through a peer-review process internally where staff will review colleague’s content prior to sharing with Program Management for approval of content.
3. Then, the document is sent on to Felicia Houston who will be responsible for formatting and accessibility checks.
4. The document is then signed off at the Center level and passed along to IDOE for final approval.

**Marketing and Communications Plan Guidelines:** A communication and marketing plan will be created for Indiana Department of Education’s approval by November 30th, 2022. The proposed marketing and communications plan will include up to three key messages, specific audiences, and modes of communication by quarter through the two years of the contract terms.

**Proposal of Marketing and Communications Plan:**

|  |  |  |
| --- | --- | --- |
| Proposal Plan for October 1, 2022 to September 30, 2023 | | |
| Quarter (Dates) | Activity | IEP TA Center Staff Responsible |
| Quarter 1 (October 1 - December 31, 2022) | Develop and finalize marketing and communications annual plan for project | Felicia Houston, Dale Thomas, Mark Suiter, Angela McKinney, and Marcee Wilburn |
|  | Rebrand and redesign website homepage for easier navigation by users | Felicia Houston, Dale Thomas, and Mark Suiter |
|  | Update website on a weekly or bi-weekly basis | Mark Suiter |
|  | Create a variety of branding and accessibility tools and guides for internal staff of the IEP TA Center to implement a cohesive and consistent brand across all platforms | Felicia Houston |
|  | Manage Indiana Special Education Directory annual edits and make available on website | Felicia Houston and Mark Suiter |
|  | Maximize use of electronic newsletter and social media for disseminating resource materials and time sensitive information to educators | Felicia Houston, Dale Thomas, Mark Suiter, Angela McKinney, and Marcee Wilburn |
|  | Rebrand and redesign basic information and marketing materials to create a brand image for the center | Felicia Houston |
| Quarter 2 (January 1 - March 31, 2023) | Develop communication and marketing materials for 2-day conference in September | Felicia Houston |
|  | Reimagine website’s main web page tabs | Felicia Houston and Mark Suiter |
|  | Produce and execute video highlights of successful in-district trainings, including district feedback, teacher impact, and student outcomes | Dale Thomas |
|  | Update website on a weekly or bi-weekly basis | Mark Suiter |
|  | Maximize use of electronic newsletter and social media for disseminating resource materials and time sensitive information to educators | Felicia Houston, Dale Thomas, Mark Suiter, Angela McKinney, and Marcee Wilburn |
| Quarter 3 (April 1 - June 30, 2023) | Produce and execute video highlights of successful in-district trainings, including district feedback, teacher impact, and student outcomes | Dale Thomas |
|  | Reimagine website’s main web page tabs | Felicia Houston and Mark Suiter |
|  | Update website on a weekly or bi-weekly basis | Mark Suiter |
|  | Maximize use of electronic newsletter and social media for disseminating time sensitive information to educators | Felicia Houston, Dale Thomas, Mark Suiter, Angela McKinney, and Marcee Wilburn |
| Quarter 4 (July 1 - September 30, 2023) | Collaborate with print production vendors to meet deadlines and produce high-quality event materials for 2-day conference | Felicia Houston |
|  | Produce concurrent session videos from 2-day conference | Dale Thomas |
|  | Update website on a weekly or bi-weekly basis | Mark Suiter |

**Section 9: Staff Qualifications**

**Qualifications of Core Team:** The core team of the IEP TA Center was formed over time to respond to both work/task needs and to represent a variety of backgrounds, experiences, and perspectives. Staff come from educational backgrounds such as special education, general education, special education administration, building and district administration, and school psychology. Additionally, other core staff have the required expertise to perform complementary work that is essential to the overall goals and activities of the project.

All staff are knowledgeable in the areas of Article 7, Individuals with Disabilities Education Act (IDEA), and Family Education Rights and Privacy Act (FERPA). Staff are intentional about continuous learning to maintain current knowledge in the field by participation in book studies, webinars, conferences, trainings, Facilitated IEP training, and Professional Development for PD Providers, etc. Scholarly articles are distributed to review and discuss at staff meetings to promote collaborative learning and potential enhancement of current practices. TA Specialists have knowledge of adult pedagogy and principles of adult learning. Staff continuously strive to adapt any virtual learning to include activities that promote active learning and engagement, such as the use of polls, quizzes, prompts, and group activities in virtual break-out rooms.

Because many schools and districts are working toward improvement in multiple areas, the IEP TA Center recognizes the importance of collaboration with other TA Centers and groups to coordinate efforts. Staff possess key collaboration characteristics and skills, including open-mindedness, strong communication, organization, long-term thinking, adaptability, and productive debate skills. Staff will work collaboratively with other TA Centers and groups to support schools and districts.

See Appendix G for the IEP TA Center’s team Curricula Vitae.

See Appendix H for the IEP TA Center’s TA Specialist sample videos and training materials.