



Individualized Educational Program Technical Assistance RFP SOW

Section 1: Purpose/Background

The Indiana Department of Education (IDOE) created the Indiana Resource Network (IRN) in the last decade as a means to offer technical assistance and support to local education agencies (LEAs) serving Students with Disabilities. The state of Indiana currently boasts 406 LEAs which serves 183,266 students with Individualized Educational Programs (IEPs) ages 3-22. Of the 406 LEAs, there is representation in each of these settings: rural, urban, and suburban. The IRNs, over the course of almost 2 decades, provide varying levels of technical assistance to approximately 75% of LEAs. The IRNs are subdivided by areas of focus. The focus for this contract is for the Respondent to provide support for Individual Education Program (IEP) development and technical assistance (TA).

This specific scope of work (SOW) addresses technical assistance in relation to providing support for voluntary and required LEAs and addresses needs defined under the Contractor Responsibilities and Deliverables section. The Respondent must have a deep level of understanding of Article 7 (<https://ichamp.doe.in.gov/article7.pdf>), IDEA (<https://sites.ed.gov/idea/>), and FERPA (<https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html>).

The IDOE defines technical assistance as the process of providing targeted support to an LEA with a development need or problem. The need or problem is typically identified by the state-driven accountability system. This system is 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. It is an effective method for building the capacity of an LEA and is also typically delivered over an extended period of time. More information can be found here: <https://www2.ed.gov/about/offices/list/osers/osep/rda/index.html>

The vendor for this procurement will be responsible for delivery of technical assistance to schools which includes: 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. The request and/or identification for technical assistance would be managed by the IDOE and distributed to this vendor and/or other IRNs based on the types of service needed and the expertise and contracted intent of their agreement with the IDOE.

Section 2: Program Manager and Project Management Team

The IDOE expects a robust team to support technical assistance and manage logistics and key deliverables. The Respondent shall assign a program management team led by one single Full-Time Equivalent Program Manager (PM), PMP certification is preferred. Preferably, the Program Manager would have no fewer than five years of program management experience serving in the educational field or with government agencies. The Program Manager shall serve as the primary liaison with IDOE for all components of the project and deliverables. The Project Manager is responsible for providing status reports in a format and frequency agreed to by DOE and the Respondent to help drive transparency in Respondent activities as part of the program and communicating any issues/risks/barriers/opportunities to DOE leadership to help drive expected value of respondent activities. The Respondent's PM must oversee and coordinate the efforts of the Respondent and all related subcontractors, if applicable.

In addition to the program and project managers, a cohesive, dedicated, skilled core team is critical to the success of this project. At a minimum, this core team of key personnel shall be listed in the Respondent's proposal. Identifying core team key personnel (i.e., those assigned more than 20% FTE) as specific individuals is a mandatory requirement for the work to be performed under this contract and is subject to approval by IDOE. Specific examples of team members are noted in the section titled, "Staff Qualifications".

The Respondent must provide an organizational chart showing all key staff and organizational offices assigned to work on the various aspects of this project along with each member's defined FTE for the duration of the contract specified by contract year. Roles and responsibilities for all key staff must be identified. Resumes of key staff must be included in the Respondent's proposal. Subcontractors utilized for substantial efforts (i.e., those assigned more than 20% FTE) must also be addressed within the organizational structure. Narrative delineating the responsibilities and oversight by the primary contractor is required within the proposal.

Except in the case of illness, death, or leave of absence, and so long as the personnel remain partners, principals, or employees of the Respondent, no re-deployment of any member of the core team as required by the work plan may be made without prior written consent of IDOE, which shall not be withheld without good cause. Replacement of such personnel, if approved, shall be with personnel of equal or greater ability and qualifications within 30 days of notification to IDOE. IDOE reserves the right to interview a replacement prior to onboarding.

Subcontractors

The Respondent may complete a portion of the required services and deliverables using subcontractors. If the Respondent elects to use subcontractors for any part of the required scope of work, the Respondent must describe in the proposal: 1) the work to be subcontracted to that organization, 2) the anticipated supervisory structure, 3) a detailed plan for regularly overseeing the quality of the subcontractor's work within the

proposal, and 4) an explanation regarding how the Respondent will ensure that all deliverables are completed in accordance with the requirements of the contract. All subcontractors must be approved by the state. The Respondent will serve as the sole point of contact for all contractual matters, including those that may impact or involve a subcontractor. Deficiencies in work performed by any subcontractor are the responsibility of the primary contractor. The Respondent must indicate acknowledgement of this in the proposal.

The Respondent must clearly identify subcontracted services, and must provide one-page resumes indicating relevant educational background and professional experience for subcontractor staff in primary roles (i.e., those assigned more than 20% FTE).

Section 3: Project Plans and Schedules

The Respondent shall continuously monitor the ongoing operations of the project using a detailed project plan and schedule. The Respondent shall provide an annual updated project plan and schedule for joint use by IDOE and the Respondent in monitoring all program activities by December 15 of the initial contract year and by July 1 every year thereafter. IDOE will approve the project plan and schedule each year. The newest version of the yearly schedule will begin no later than 10 business days after the start of the new contract year. The Respondent's proposal must indicate acknowledgement of this requirement.

IDOE requires appropriate, frequent, direct, real-time access to the project schedule. In addition, weekly updates showing all deliverables for a current week and the subsequent six weeks must be provided to IDOE on Thursday (by noon ET) of each week. Holidays may be adjusted as agreed to by both parties. All schedule adjustments made to the overall schedule must be noted both in the master project plan schedule and in the weekly updates. This schedule must delineate agreed upon durations, associated tasks, and the party responsible for completing each deliverable or process step. Changes to key milestones in the master schedule will require a contract amendment. The Respondent must provide a master schedule highlighting the key milestones on the critical path for 2022-2023 within the proposal.

The Respondent must provide documentation regarding any missed deadlines, litigation, or breaches of contract due to missed deadlines resulting in compromises of a contract of similar nature as part of the proposal. Any failure to disclose may result in elimination of consideration.

Section 4: Project Meetings

The Respondent must facilitate virtual bi-weekly status meetings with IDOE to address all aspects of the project. The Respondent must complete the following tasks for each meeting:

- Establish and facilitate bi-weekly project status meetings. Meetings are virtual and should be held using a virtual conferencing software. Microsoft Teams is preferred, but not required. IDOE reserves the right to request more frequent status meetings as key milestones and deliverable dates approach to ensure timeline updates driving heightened success.
- Draft a meeting agenda and provide it to IDOE for review and approval at least 24 hours in advance of each meeting.
- Record status meetings and make them available throughout the term of the contract.
- Provide meeting minutes for IDOE's review and approval within 24 hours of the meeting completion.

The Respondent shall also be responsible for providing weekly status reports (e.g., written notes and other applicable documentation) from the weekly status meetings to IDOE within 24 hours of each meeting, using a format approved by IDOE. The Respondent must ensure that weekly written status reports provided to IDOE include, but are not limited to, the status of ongoing activities, decisions made, decisions pending, activities completed, activities that are behind schedule (including planned action steps to rectify the deviation from agreed upon timeline), and timelines for scheduled activities. The Respondent will also maintain a decision and action log to track any outcomes from meetings held with IDOE. The decision log must note any decisions that require a contract amendment. The Respondent will also maintain a risk or issue log with associated mitigations (planned or in place). The decision log must note any decisions that require a contract amendment. The Respondent is responsible for providing the following deliverables to IDOE each week:

- Updated project schedule;
- Updated decision/action log;
- Risk/issue log with associated mitigations;
- Minutes from each status meeting which occurred within 24 hours.

Annually, the Respondent must facilitate a project Kickoff meeting with IDOE to review key milestones and efforts for the upcoming year and receive approval of the proposed project schedule. This meeting shall take place no later than 10 business days into the new contract year. The Respondent is responsible for a year-end summary to document accomplishments, value delivered and improvement opportunities for the previous year in an agreed upon format. There may also be a need for additional planning meetings. These will be at the Respondent's expense with dates, times, and locations to be mutually agreed upon by the vendor and IDOE.

Section 5: Timeline for Project

The anticipated start date for the project is October 1, 2022. Contract end date for the contract is September 30, 2024. Maintaining project timelines are critical to cost and project completion.

Table 1. Key Timelines for Deliverables

| Task | Deliverable | Anticipated Start | Anticipated Completion |
|---|--|--|-------------------------------|
| Project Kickoff Meeting | Summary of key milestones and efforts for upcoming year | October 1, 2022 July 1, every year after. | Ongoing |
| State Level TA Plan | Approved TA Plan which includes all 3 levels of TA and takes into consideration all tasks listed in deliverables below including how tasks will be monitored | October 1, 2022 | November 1, 2022 |
| LEA Level TA Plans | Approved TA Plans - 1 per LEA | November 1, 2022 | Ongoing |
| Development and Approval of Communications Plan | Approved Communications Plan | November 1, 2022 | October 31, 2022 |
| Project Management Plan | Detailed project plan and schedule. | October 1, 2022 July 10 every year after | |
| Status Reports/Meetings | Updated project schedule, decision log, risk log, minutes, and meeting recording | Within 48 hours of the meeting. | Ongoing |
| Executive Summary of Technical Assistance efforts across LEAs | Summary | Quarterly beginning January 1, 2023 | Ongoing |
| Year-End Summary | Year-end summary of accomplishments, value delivered and improvement opportunities for the previous year. | June 30 each year. | Ongoing |
| State Level Conference | Conference theme based on need determined by the State Performance Plan and technical assistance provided in the previous year. | Planning to begin January 1, 2023 | Mid-September 2023 |

Details about the work defined within each year is highlighted in additional detail as the key deliverables are defined.

Section 6: Contractor Responsibilities/Deliverables

This request for proposal assumes several components for the vendor to support including: 1) the writing of all aspects of IEPs, including but not limited to: goal writing, least restrictive environment, progress monitoring, accommodations and modifications, 2) best practices of facilitating case conferences, and 3) training and development of identified school corporations, both voluntary and required, and 4) selection of materials and corresponding resources associated with improving outcomes for special education students, but may also apply to Black and Hispanic students, and 5) develop TA resources for universal technical assistance, and 6) develop and deliver technical assistance for equity-based inclusive practices for school-aged and early childhood students, and 7) deliver technical assistance for state-driven accountability systems (<https://www2.ed.gov/about/offices/list/osep/osep/rda/index.html>) by developing a TA plan for each LEA in levels 2 and 3 (further details of the plan noted below in *Development of Technical Assistance Plan* section), and 8) research and evaluation of programs at key intervals to ensure adaptation of the required plans to foster success. A successful Respondent will be able to implement a fully approved state-level technical assistance plan with the eight pieces above that will result in the following:

- Completion of universal activities provided to the field, across the state
- Correction of findings of non-compliance per indicator
- Adequate progress in student outcomes as defined by state-driven accountability

The Respondent is responsible for ensuring staff are available to offer technical assistance throughout the year aligned to the IDOE's guidance and expectations. The expectations are laid out for current guidance beginning on page 7 of this document and will be developed based on any new guidance. This includes approved TA Plan materials, meeting agendas and minutes, participation summaries, surveys and results, attendance records.

The Respondent is responsible for recruitment of voluntary and required and oversight of LEAs. The participating LEAs will be a combination of voluntary and involuntary; however, all LEAs receiving targeted or intensive technical assistance will be required to sign an assurance document for long term review and support by IDOE. The Respondent will write the assurance document as a part of each LEA TA Plan. IDOE will support the respondent in developing the first three months' deliverables so there is a transition from previous TA work to IDOE newly approved processes. The details of what will be included in the assurance document are listed in a subsequent section.

The training and development processes are outlined in greater detail below. It is expected that the Respondent procure a location for on-site training for three general regions of the state (i.e., north, central, south). Training costs are the responsibility of the Respondent and include all logistics and incidentals. These costs must be assumed

in the cost proposal submitted. Specific description of training is listed below in each of the technical assistance levels.

The Respondent is responsible for defining and delivering resources and applying evaluation measures to support the success of the technical assistance they provide to LEAs. All LEAs, either identified by IDOE or volunteer, will utilize an approved technical assistance plan to ensure meaningful participation and collaboration. The Respondent is responsible for the development of this plan with each LEA. Respondents must address associated costs submitted for materials and resources to support identified populations within the cost template. Use and reproduction of materials and associated permissions is the responsibility of the vendor for this contract.

The state level technical assistance plan must be approved at defined intervals specified by the Department. However, it is intended to be as flexible as needed to ensure sustainability and success. Specific data collections may also be needed by the Respondent to support critical shifts in design or delivery if quality or implementation is under review by the Department. IDOE does not expect to continue specific aspects of state level technical assistance for the subsequent year if data does not support success in moving forward.

IDOE must approve any materials developed or licensed prior to delivery. The Respondent and any subcontractors are assumed to represent IDOE's initiatives with fidelity; therefore, quality deliverables and timely delivery are expected. IDOE must receive and approve final versions of all deliverables (i.e., agenda, handouts, presentations, and videos) presented to educators no less than two weeks in advance. Deliverables should be shared with IDOE via shared Google Drive in a mutually determined format following delivery deadlines and instructions outlined in this document.

The successful Respondent will apply quality control measures to ensure all deliverables (e.g., documents, materials and reports) are error-free prior to posting for IDOE's review. The Respondent's proposal must describe the specific quality control measures that will be implemented to ensure accurate and error-free documentation.

Section 6.1 - Technical Assistance Requirements: Levels of Technical Assistance

IDOE follows the CDC framework* for Technical Assistance. It is the process of providing targeted support to an LEA with a development need or problem. It is an effective method for building the capacity of an LEA and is also typically delivered over an extended period of time. In order for technical assistance to be effective, the specialist or consultant should adhere to a set of core principles. Effective TA should be:

- *Collaborative* – Work jointly with the organization's staff to identify underlying needs.
- *Systematic* – Use an orderly approach.

- *Targeted* – Determine where technical assistance will have the greatest impact.
- *Adaptive* – Be flexible.
- *Customized* – Respond to the unique needs of the organization.
- *Results-driven* – Identify measures that indicate improvement.

Once a Respondent has been chosen, they will become known as a Technical Assistance (TA) Center working in close collaboration with IDOE. Additionally, they will become part of the Indiana Resource Network (IRN) and be expected to collaborate within the network when needed.

IDOE employs three levels of technical assistance which are universal, targeted, and intensive; They are defined as follows:

Universal, General (Level 1) is defined as passive technical assistance (TA) and information provided to independent users through their own initiative resulting in minimal interaction with TA Center staff and includes one-time, invited or offered conference presentations by TA Center staff. This category of TA also includes information or products, such as guidebooks, or research syntheses, downloaded from the TA Center's website by independent users. Brief communications by TA Center Staff with recipients, either by telephone or email are also considered Universal, General TA. We expect for universal support to be the smallest portion of TA approximately 10% of contracted efforts, provided by the Respondent with the other 90% focused on providing specialized and intensive support to LEAs. Universal technical assistance may include but is not limited to training materials created by the respondent, informational brochures, one-time conference presentations, electronic newsletters, social media and networking activities, field-initiated demonstration activities, factsheets and research summaries, and the Respondent's website and web-based training opportunities. Universal TA can be held on-site, virtual, or at a third party location (i.e., hotel conference room) but must be agreed upon with IDOE. It is expected that the Respondent will host and present the following number of Universal TA sessions: 20 sessions in Indianapolis, 10 sessions north, 10 sessions south, 10 sessions virtual. These sessions may be full day or two half-day and will be agreed upon by the Respondent and IDOE. Historically the sessions have focused on skills the field needs for successful IEP development. Examples would include: goal writing, progress monitoring, and facilitating case conferences. The local LEA will incur logistical costs of attendance. The Respondent will be responsible for virtual sessions logistics such as platform, registration, feedback surveys, and resources.

Targeted, Specialized (Level 2) is defined as a service developed based on needs common to multiple recipients and not extensively individualized. A relationship is established between the TA recipient and one or more TA Center staff. They can also be episodic, less labor-intensive events that extend over a period of time, such as facilitating a series of conference calls on single or multiple topics that are designed

around the needs of the recipients. Facilitating communities of practice can also be considered Targeted, Specialized TA and defined in both state and LEA level plans. The Respondent should expect to engage no less than 20 direct contact hours per LEA (between 80-100 LEAs) for targeted technical assistance. At least 10 hours should be on-site. Remaining hours can be held on-site, virtual, or at a third party location (i.e. hotel conference room) but must be agreed upon with IDOE. Targeted, Specialized technical assistance includes prescriptive one-time or episodic events offered by the Respondent. These training and support events are developed based on needs that are common to one or multiple recipients, and they are more topical and may not be extensively individualized. Targeted & Specialized TA include hosting a regional or state conference, and/or offering a series of conference calls on a particular topic. Respondent's staff and IDOE staff serve as co-collaborators in Targeted & Specialized TA. The Respondent is responsible for costs for all travel and logistics related to onsite support.

Intensive, Sustained (Level 3) is defined as services often provided on-site and require a stable, ongoing relationship between the TA Center staff and the TA recipient. 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. In the event an LEA requires elevated support, they will be given the determination of Intensive, Longstanding (Level 3+). This level of TA support includes services provided on-site and requires a stable, ongoing relationship between the TA Center staff and the TA recipient. More than one TA center may be involved in support. TA services are defined as a negotiated series of activities designed to reach a valued outcome. This category of TA involves continued desktop audits and on-site visits over a defined period of time and should result in changes to policy, program, practice, or operations that support increased recipient capacity and/or improved outcomes at one or more systems. The Respondent should expect to engage no less than 30 direct contact hours per LEA (between 20-30 LEAs) for intensive technical assistance and no less than 40 direct contact hours for intensive, longstanding LEAs (between 5-10 LEAs). For Intensive level schools up to 10 hours can be virtual check-ins. All remaining hours are expected to be on-site. The Respondent is responsible for costs for all travel and logistics related to onsite support.

Training Specialists will take a case management approach to the work. They may provide all three levels of TA: Universal, Targeted, and Intensive. In Targeted and Intensive TA, Specialists will divide and self-assign LEAs. The hours listed above are direct contact hours. The Respondent should plan to spend about 20 non-contact hours per LEA. The Respondent will incur costs for on-site travel to LEAs as described in each level of TA above.

Section 6.2 - Coordination of State-Level Conference

For the past 10 years, the IDOE has partnered with vendors to develop and hold an annual conference specifically designed to support general educators, special educators, related service personnel, and administrators. This year's conference had approximately 600 registrants composed of special education teachers, general education teachers, administrators, related service personnel, etc. The conference will be expected to occur over 2 full days, and must be scheduled during a workweek. Each day is expected to have an opening/keynote speaker, and at least four subsequent breakout sessions occurring throughout the day of no more than an hour. Most speakers charge a fee and should be leaders in Special Education. The conference theme, guest speakers, and all resources such as presentations and book offerings will be mutually agreed upon by IDOE and the Respondent. Historically, there has been a registration fee charged to cover costs where federal dollars can not be used. An example would include food (lunch and snacks).

The Respondent will be responsible for the coordination and hosting of the conference. The theme of the conference will be determined collaboratively by the Respondent and IDOE-OSSA. Coordination of this event includes the following: securing the location, compiling line items for the working budget, attaining conference presenters and presenter contracts, managing corresponding materials, and all marketing. The conference cost should not exceed \$300,000.00.

Section 6:3 - Development of Technical Assistance Plans

Due to the prescriptive nature of technical assistance for targeted and intensive levels of TA, it is the expectation that all plans be developed in collaboration with LEAs, and approved by IDOE.

At a minimum, all plans must include the following:

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

Once a TA plan has been approved by IDOE, it is the expectation that every LEA participating in technical assistance will sign an assurance agreement to further establish expectations and rules of engagement in the TA process.

Section 6.4 - Assurance Agreements

Assurance agreements are documents which outline the expectations of both the LEA and TA center, more specifically, the intention to remain committed to the TA plan and process. They are required for Targeted and Intensive levels of TA only. TA plans may extend beyond one calendar year and should include 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

Section 6.5 - Voluntary and In-voluntary Participation

Throughout this document, the terms involuntary and voluntary have been used to describe the types of LEA participation. Voluntary is defined as a participant who actively and willfully seeks out assistance for an identified need not prompted by IDOE. They may request varying levels of technical assistance for the purpose of improving outcomes for students in one or more of the student populations identified above.

Required describes a participant who has been identified by IDOE. This identification can be based on the following, but is not limited to areas of noncompliance (singular or ongoing), student outcomes data, service provision, and program effectiveness. IDOE will identify LEAs and, in some cases, identify areas of need for technical assistance. IDOE will work with Respondent and LEA to ensure meaningful participation and progress.

Technical assistance planning will begin in October of 2022 and should be conducted regionally (e.g., southern Indiana, central Indiana, and northern Indiana). It is expected that the Respondent will procure a location for on-site training for the three general regions of the state referenced above.

In addition, the Respondent must also provide all participants with an appropriate number of selected sets of materials and/or tools necessary to apply the technical assistance.

Modifications to off-the-shelf professional development will be mutually determined by the Respondent and IDOE after the Respondent is selected. Any modifications to existing professional development sessions does not give IDOE intellectual property rights to the materials. Any new professional development created as a result of this partnership will become the sole intellectual property of IDOE.

Onsite meeting costs and any requisite materials must be submitted with the cost proposal.

The successful Respondent will be responsible for providing ancillary training supplies, meeting facilities, video/audio equipment, or learning management systems for training the LEAs. These costs must be clearly outlined in the cost proposal. Any other pricing models or formats will be deemed nonresponsive and disqualified.

Adult learning pedagogy is essential to be considered for delivery. Any virtual training components should include interactive content. An assessment of participant knowledge and/or check for understanding must also be conducted. The Respondent will submit a proposed plan for training and follow-up support that may include a Respondent-provided online format such as webinars, podcasts, video conferences, or a digital platform or a learning management system that must collect relevant participant performance and participation information.

The specific schedule and dates of training sessions must be approved by IDOE. The Respondent will be expected to begin technical assistance in January 2023.

Section 6:6 - Monitoring and Oversight

The Respondent must provide IDOE detailed and accurate records of participating LEAs and their completion of training and activities through the duration of the contract. This includes attendance records, sign-in sheets and summaries of IDOE approved participant evaluations of training such as exit surveys, quizzes, or written paragraphs to targeted constructed response questions. This summary is due within one week of training sessions and must be stored in a location accessible by IDOE and the Respondent.

In addition, a monitoring plan must be included in each LEA level TA plan. The purpose of the monitoring plan is to provide detailed descriptions of how the Respondent intends to oversee the TA plan. The plan will include 1) when and how site visits will occur, 2) when coordinated feedback conversations will be scheduled, including the provision of summary documentation to IDOE, 3) an escalation protocol when issues arise and how those instances will be communicated to vendor, school administration and IDOE.

IDOE expects the Respondent to communicate with each LEA on a specified schedule determined by level of need. A summary of each onsite visit must be documented with IDOE within one week. The format of the summary will be mutually agreed upon by the Respondent and IDOE.

The approved escalation protocol referenced above must be established when an issue arises for the LEA related to technical assistance implementation. These issues may include but are not limited to failure of the LEA to participate or perform, or issues specific to the local context. The Respondent must ensure an approved plan for LEAs to communicate with the Respondent if urgent needs arise. Assurances will be signed by each corporation to ensure adherence to expected practices with delivery and personnel.

The assurances between the Respondent and collaborating school corporations must specifically clarify all of the processes, evaluation, documentation, and data sharing that will take place through the technical assistance plan. A copy of the assurances must be provided to IDOE for each corporation.

The Respondent is responsible for providing IDOE with all required documentation, updates, and materials on time and in clear, accurate formatting and language.

Training Specialists will take a case management approach to the work. They will provide all three levels of TA: Universal, Targeted, and Intensive. In Targeted and Intensive TA, Specialists will divide and self-assign LEAs.

Submission of Executive Summary of Technical Assistance

The Respondent will submit an executive summary quarterly to the IDOE. This summary will include the following information:

- Evidence of completed deliverables and activities
- Progress updates on Technical Assistance Plans
- Contacts made to LEAs including duration, type of contact, and response
- Summary of Technical Assistance methodology of delivered
- Anticipated activities to begin in following quarter

Section 7: Expert Collaboration and Engagement

The Respondent is responsible for managing additional experts (no more than two additional subcontractors) related to external expertise. IDOE acknowledges that the primary contractor may not have specific expertise to support training, curriculum development, and research in all areas necessitated by this work. Any subcontractor deemed necessary to support due to their expertise related to the defined expertise are allowed to provide services to the Respondent, respondent's staff and identified LEAs. That service can be in the form of consultation, training, and/or coaching. It is assumed that expert collaborators serving as subcontractors may contribute 200 hours annually for the duration of the contract (i.e., approximately five hours per week) to inform best practices in goal setting and instructional support. Resumes of experts must be submitted as part of the proposal for review and are subject to approval by IDOE. Experts may, but are not required to, attend and offer specific training and expertise. An example of this would be to subcontract with a school psychologist to provide TA relative to testing for Special Education placement consideration.

Section 8: Communication and Marketing

The Respondent will be responsible for creation, implementation, and maintenance of a communications plan over the contract duration. Consumers of the communication plan will include: 1) Identified schools, 2) Volunteer opt-in schools, and 3) Higher Education institutions, and 4) general awareness for other schools. The communication plan must include 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 is a somewhat challenging task in educational settings. The Respondent may subcontract efforts with other partners to support marketing. This effort assumes communications follow two key aspects including communications for recruitment and training or transparency about the process and best practices for those not directly involved.

The proposed communications plan must be submitted within the first month of the contract and drafted to consider up to three key messages, specific audiences, and modes of communication by quarter through the two years of the contract terms.

Section 9: Staff Qualifications

The Respondent must submit resumès of all staff dedicated for at least .5 FTE. Respondents are expected to have the following staff members address key work according to the responsibilities below:

The Program Director will manage this contract including scope, schedule and budget. The Program Manager will serve as the main point of contact for IDOE staff to manage scope, schedule and budget. PMP certification is preferred for the individual managing these efforts. The Program Manager must manage all subcontractor efforts to ensure successful delivery of all key deliverables. The Program Manager will ensure that Specialists' licenses and certifications are current. The Program Manager's resumè must highlight large-scale projects previously managed.

Project Manager will manage efforts for all deliverables. PMP certification is preferred for the individual managing these efforts. The Project Manager must review all subcontractor deliverables to ensure quality of all key deliverables. The Project Manager's resume must highlight large-scale projects previously managed.

Training Specialists (6 staff members) will oversee delivery of training efforts. Staff members must have extensive experience in adult learning with a proven track record of large-scale implementation efforts at the corporation or state level. Staff members must have extensive experience working directly with students in a k-12 setting within the last 10 years. Sample videos or training materials created by this individual may be submitted with the proposal. Several specialists should be trained to facilitate case conferences when needed. Training Specialists will take a case management approach to the work. They will provide all three levels of TA: Universal, Targeted, and Intensive. In Targeted and Intensive TA, Specialists will divide and self-assign LEAs.

Resources:

https://www.cdc.gov/healthyschools/professional_development/videos/pd101/05-technical_assistance.pdf