

RFP 27-87901
Attachment K

STATEMENT OF WORK

I. EXECUTIVE SUMMARY

The Indiana Department of Education (IDOE) requires growth analyses on [ILEARN](#) and [ACCESS](#) assessments to meet statutory requirements under [ESSA Sec. 1111\(c\)-\(d\)](#) and [IC 20-31-8-4\(a\)](#). These analyses support Indiana’s statewide accountability model under [511 IAC 6.2-12](#) and provide accurate, defensible measures of student progress.

II. BACKGROUND AND CURRENT STATE

This work ensures IDOE can produce accurate, defensible student growth percentiles and growth targets that underpin Indiana’s redesigned statewide accountability system. The selected vendor will provide the technical expertise, methodological continuity, and rigorous quality assurance necessary to generate trustworthy growth measures that inform resource allocation, guide state monitoring of school performance, and withstand public and legal scrutiny. To achieve these outcomes, the vendor must also serve as a strategic partner—communicating complex analytical decisions clearly to state leadership and collaborating with the incumbent vendor to maintain continuity across growth, growth to standard, and English learner proficiency metrics.

III. SCOPE OF WORK

a. OBJECTIVES OF ENGAGEMENT

IDOE requires the selected vendor to annually calculate, produce, and deliver student growth percentiles and corresponding growth targets for accountability purposes. Because the student growth model is highly visible and may be subject to public scrutiny or legal challenge, the vendor must be able to clearly explain, support, and defend the model and all associated methodologies, analyses, and results including communicating assumptions, limitations, and technical decision points in accessible language.

Given the complexity and high-profile nature of this work, the selected vendor must serve not only as a technical resource but also as an adviser and thought partner to the Department. The vendor must demonstrate a strong record of engaging with diverse audiences on complex analytical topics and must be able to communicate the implications of nuanced measurement and modeling decisions to State decisionmakers in a clear and accessible manner.

In addition, due to the high stakes environment surrounding accountability calculations, the vendor must have proven experience implementing comprehensive quality assurance processes that ensure the accuracy, consistency, and integrity of all results delivered to the Department.

Potential vendors must be prepared to coordinate with the incumbent vendor to ensure methodological continuity, particularly regarding growth percentiles, growth-to-standard metrics, and English learner proficiency measures.

- **Deliverable 1) ILEARN and ACCESS ELP Growth Model Analysis** anticipated to occur from June through September annually each year of the contract
 - Calculate the student growth percentile and student growth percentile target for each student using assessment data provided by IDOE. This is expected to be provided to the vendor beginning in June each year and continuing throughout the summer. This must include both cohort and baseline referenced analyses. Growth must be calculated using the following definitions:
 - "Student growth percentile" has the meaning set forth in the standard adopted by the [National Center for the Improvement of Educational Assessment, Norm- and Criterion-Referenced Student Growth, Educational Measurement: Issues and Practice, Winter 2009, Vol. 28, No. 4, pp. 42–51.](#)
 - "Individual student growth target" refers to the [student growth percentile target calculated under the academic progress indicator](#) in Indiana's approved ESEA Plan as authorized by Section 1111(c)(4)(B)(i)(II) of the Elementary and Secondary Education Act as amended by the Every Student Succeeds Act.
 - Export individual-level data and securely transfer to IDOE for approval within 20 days or unless mutually agreed in writing. Exports must be in CSV format with a data dictionary and transferred via the State's MFT secure transfer platform. At a minimum, the individual-level data file must include: STN, CorpID, SchoolID, Test, Scale Score, SGP, and Target. See "Transfer of Secure Information," below.
 - Produce a technical report in a format agreed upon with IDOE and provide complete documentation/source code of student growth analyses including justifications for all modeling choices, alternate approaches considered and limitations. This report should also document the process and summarize the findings including recommendations to IDOE. Examples of previous reports and presentations can be found here:
 - [Growth to Proficiency Table Target Ranges \(2019\)](#)
 - [Report on the Student Learning Recovery Grant Program \(2022\)](#)
 - [Calculating and Reporting Student Growth in Indiana \(2014-2015\)](#)
 - [Student Growth and Accountability in Indiana \(2014\)](#)
 - [Student Growth in Indiana presentation](#)
 - [Student Learning Recovery Grant Report \(2023\)](#)
 - Knowledge transfer and training of IDOE staff on analyses conducted. The vendor shall provide structured knowledge transfer and training to IDOE staff to ensure full understanding of the student growth analyses conducted. This shall include delivering clear explanatory materials, such as process documentation and visual flowcharts; presenting findings and methodological details through virtual or in person briefings; and supplying summary reports or presentation-ready materials as needed. The vendor will meet with IDOE staff on a recurring schedule to review interim results, address questions, and ensure IDOE can accurately interpret and apply all analytic outputs. The vendor will coordinate with the incumbent vendor to obtain historical documentation, code, and artifacts needed for methodological continuity.
- **Deliverable 2) Development of Growth Documentation and Communication Resources** will take place annually throughout the contract, starting January 2027.

- Create clear growth explanation materials for IDOE that effectively convey concepts to audiences with different technical backgrounds.
- Produce accessible resources including PDFs, recorded presentations, visual flowcharts, and other explanatory formats that IDOE can use in external communications.
- Tailor all materials for dissemination to stakeholder groups such as schools, teachers, district administrators, parents, community members, and local education leaders.
- Ensure all documentation supports clarity, accessibility, and consistency in IDOE messaging regarding the purpose, methodology, interpretation, and implications of growth results.
- **Deliverable 3) General Consulting** will take place annually throughout the contract, starting January 2027.
 - Provide ongoing consultation to IDOE on the use, interpretation, and application of ILEARN and ACCESS data within the statewide accountability system.
 - Serve as an expert advisor and thought partner to IDOE on matters related to student growth modeling, assessment, and accountability policy.
 - Participate in recurring meetings typically held biweekly with IDOE accountability staff to review data, address questions, and support decision making. Meetings will occur primarily in a virtual format, with in-person sessions taking place only on rare occasions.
 - Prepare and deliver growth-related briefings or presentations to IDOE accountability staff upon request.
 - General consulting services will occur annually throughout the contract, beginning January 2027, and will be compensated on a fixed fee basis covering up to 144 hours per year. This work is expected to require approximately 1.5 days per month (about 12 hours per month, or 144 hours per year, depending on IDOE's standard workday definition). Vendors must structure pricing to reflect this defined annual time commitment.

b. DELIVERABLES AND DEADLINES

The table below reflects the timeline for 2027, but all tasks except the project kickoff meeting are expected to occur at approximately the same time each year for the duration of the contract (January 2027 through December 2030).

<i>Task</i>	<i>Deliverable</i>	<i>Anticipated Start</i>	<i>Anticipated Completion</i>
Facilitate project kickoff meeting	Agenda, Minutes	January 2027	March 2027
<i>ILEARN Growth Model Analysis</i>	<i>Export of individual-level data, technical report, documentation/source code of analysis</i>	<i>Summer 2027</i>	<i>Summer 2027</i>

<i>WIDA ACCESS Growth Model Analysis</i>	<i>Export of individual-level data, technical report, documentation/source code of analysis</i>	<i>Summer 2027</i>	<i>Summer 2027</i>
<i>Development of Growth Documentation and Communication Resources</i>	<i>Accessible resources including PDFs, recorded presentations, visual flowcharts, and other explanatory formats that IDOE can use in external communications.</i> <i>Tailor all materials for dissemination to stakeholder groups such as schools, teachers, district administrators, parents, community members, and local education leaders.</i> <i>Ensure all documentation supports clarity, accessibility, and consistency in IDOE messaging regarding the purpose, methodology, interpretation, and implications of growth results.</i>	<i>Jan 2027</i>	<i>Dec 2027</i>
<i>General Consulting</i>	<i>Ongoing consultation to IDOE on use, interpretation, and application of ILEARN and ACCESS data for statewide accountability.</i> <i>Expert advising on student growth modeling, assessment, and accountability policy.</i> <i>Participation in recurring biweekly status/consulting virtual meetings with IDOE accountability staff; occasionally in person as needed.</i> <i>Preparation and delivery of growth-related briefings or presentations upon request.</i>	<i>Jan 2027</i>	<i>Dec 2027</i>

	<i>Provide analytic summaries, technical memos, slide decks, visual representations, and data interpretation notes to support IDOE decision making; includes technical consultation on policy implications.</i>		
--	---	--	--

c. PAYMENT MILESTONES

Payment will be made as each deliverable is completed.

IV. PROJECT MANAGEMENT

Project Meetings

Project Kickoff Meeting

A kickoff meeting is required for project initiation. The purpose of the kickoff meeting is to introduce key stakeholders, points of contact for the project, address vendor or IDOE questions/concerns, provide an update on the contract status, and discuss next steps for project implementation.

- The contractor shall schedule and facilitate one project kickoff meeting. This kickoff meeting must include, but is not limited to:
 - A review of the project scope, timeline, and deliverables, including confirmation of required data inputs, anticipated analysis windows, technology or platform access needs, and any dependencies that could affect implementation.
 - Establishing communication and workflow expectations, such as designated channels for document sharing, requirements validation, scheduling coordination, and timely exchange of project information.
- The kickoff meeting will be virtual (Microsoft Teams is preferred but not required; if the vendor opts for another platform, it must be available via web browser at no additional cost and with no additional software or plugins required). If IDOE and the vendor agree to an in-person kickoff meeting, the vendor will provide the number of staff attending the kickoff, and the vendor must follow [State of Indiana travel guidelines](#) for allowable expenses and reimbursement.
- The contractor will draft a meeting agenda and provide it to the IDOE at least 72 hours in advance of the meeting. The contractor must provide meeting minutes for IDOE's review and approval within 24 hours of the meeting completion. The agenda and minutes should be provided in Word or Google Doc format.

Project Status Meetings

Project status meetings are critical for monitoring progress on project deliverables and ensuring the project remains on time and track to completion.

- The contractor will establish and facilitate bi-weekly project status meetings and will be available to meet more frequently should project needs, timelines, or IDOE requests require additional check-ins, providing the flexibility necessary to address questions, review data, or resolve issues

in a timely manner. The contractor must provide documented agendas, risks/issues logs and follow-up assignments reviewed at each meeting.

- Meetings must be virtual (unless otherwise agreed to between IDOE and vendor) and should be hosted by the vendor using virtual conferencing software (Microsoft Teams is preferred but not required; if the vendor opts for another platform, it must be available via web browser at no additional cost and with no additional software or plugins required). If IDOE and the vendor agree to in-person status meetings, the vendor will provide the number of staff attending the status meetings, and the vendor must follow [State of Indiana travel guidelines](#) for allowable expenses and reimbursement.
- The contractor will draft a meeting agenda and provide the IDOE at least 24 hours in advance of each meeting including decisions reached, open items and assigned owners with due dates. The contractor will provide meeting minutes for IDOE's review and approval within 24 hours of the meeting completion. The agenda and minutes should be provided in Word or Google Doc format.

a. PROJECT MANAGEMENT PLAN

Vendor will develop a project plan that includes all deliverables in milestone dates supported by a fully traced schedule, listed in this scope and provide it to IDOE within 15 business days of contract execution.

b. KEY PERSONS

Assessment & Accountability Technical Consultant

Contractor shall assign at least one SME or dual PM/SME role responsible for expert-level guidance on student growth modeling, accountability metric design, ILEARN/ACCESS interpretation, and data validation.

- 7–10 years of experience in the development, implementation, or reporting of state level student growth analyses, accountability metrics, or educational measurement systems; 8+ years of growth modeling experience preferred.
- Minimum 5 years supporting complex statewide or multi-agency education data projects.
- An advanced degree in educational measurement, statistics, psychometrics, mathematics, data science, or a closely related field (required).
- Advanced expertise in growth modeling methodologies such as SGP, growth to standard models, projected growth modeling, or equivalent approaches used in statewide accountability systems.
- Demonstrated ability to develop, refine, or apply growth models for state assessment programs (e.g., ILEARN, ACCESS/WIDA).
- Experience building and maintaining statistical models, reproducible analytic code, and technical documentation for state education agencies.
- Ability to clearly communicate complex analytical concepts to both technical and non-technical audiences, including policymakers and educators.
- Experience conducting knowledge transfer to support agency staff in understanding or independently running growth model procedures.
- Experience supporting statewide assessment programs in calculating student growth or accountability metrics, including in multi jurisdiction contexts.
- Experience designing or supporting analytic pipelines, software tools, or reporting dashboards used to communicate growth or accountability results.

- Demonstrated ability to work with FERPA protected datasets, including secure handling, encryption, and compliant data management practices.
- Strong understanding of ESSA reporting requirements, EL proficiency frameworks, and state growth to standard expectations.
- Ability to coordinate with incumbent vendors or technical partners to ensure continuity of methodology and comparability of growth calculations.

c. OTHER PROJECT STAFF

Project Manager

The Contractor shall designate a Project Manager who will serve as the primary point of contact for IDOE and will be responsible for overall project coordination, schedule management, communication, and delivery oversight. The Project Manager must meet the following qualifications and experience requirements:

- 5–7 years of experience managing complex education data, assessment, growth, or accountability projects at the state or multi-state level.
- Demonstrated experience working with secure student-level or FERPA-protected datasets and managing secure data workflows.
- Experience coordinating statewide or enterprise-level projects involving assessment data, growth analyses, or accountability systems.
- Strong familiarity with state education agency operations, including data validation procedures, reporting timelines, and compliance requirements.
- Proven ability to prepare technical documentation and meeting materials and support communication of complex analytic concepts to state agency staff.
- Experience collaborating with technical experts such as psychometricians, statisticians, and data scientists.
- Ability to manage projects involving integration of statistical methods, secure data transfers, and multi-stage deliverables.
- Prior experience supporting statewide growth models, accountability systems, or other large-scale educational measurement initiatives.
- Experience ensuring effective knowledge transfer to state education agency personnel.
- The Contractor may assign a staff member who also serves in another project role, such as a Subject Matter Expert (SME), to fulfill the Project Manager function, provided that the individual meets all required Project Manager qualifications. If the Contractor elects to use a dual-role resource, the Contractor must ensure that the individual has sufficient availability and capacity to perform both roles without compromising project quality, timeliness, or deliverables.

The Contractor shall clearly identify in its proposal which individual is proposed to serve as Project Manager, whether that individual will hold multiple roles, and how workload will be managed to ensure successful project execution. The resume provided for this individual must clearly demonstrate the ability to meet the requirements for both roles.

d. DOCUMENT MANAGEMENT

Documents will be stored on a shared drive as determined by IDOE and vendor during contract negotiation. The State will establish an electronic project library using the State's MFT secure transfer platform as the primary repository for all deliverables and administrative documents. The Contractor shall submit documents in editable and PDF formats, apply State-approved naming conventions, and maintain version control with an audit trail. Access permissions will be managed by the State to ensure confidentiality and compliance with applicable security and privacy standards.

e. STATUS UPDATES AND REPORTING

Status updates will be provided during the status update meetings as outlined in section IV.

V. INDEPENDENT VALIDATION AND VERIFICATION

In the event the State determines that any independent verification and validation ("IV&V") oversight is required by the State during the term of this Contract, the Contractor shall comply with any such oversight during the term of this Contract, pursuant to which an independent third-party review may be conducted by a reviewer selected by the State, for the purpose of verifying that the Contractor has performed its obligations in compliance with the terms of this Contract. In the absence of any such IV&V oversight, the Contractor shall comply with any other appropriate methods or means for verification and validation required by the State during the term of this Contract for the purpose of verifying and validating that the Contractor has performed its obligations in compliance with the terms of this Contract. The Contractor shall provide all information and documentation requested during the State's IV&V oversight or verification and validation efforts related to this Contract and in connection with any IV&V oversight or verification and validation efforts related to an initiative of which this Contract is a part.

VI. COMPLIANCE REQUIREMENTS

Statewide IT Policies, Procedures and Standards

The State has robust and comprehensive security standards that permeate all levels of the organization. The Indiana Office of Technology (IOT) has been tasked with establishing and maintaining these security standards. The security standards include assessing security risks, developing, and implementing effective security procedures, and monitoring the effectiveness of those procedures. If the proposed solution involves information technology-related products or services, all such products or services are to be compatible with any of the technology standards found in the Statewide IT Policies, Procedures, & Standards (<https://www.in.gov/iot/policies-procedures-and-standards/>) that are applicable, including the assistive technology standard. The Contractor will be required to sign a Non-Disclosure Agreement (NDA) to access the more sensitive standards and policies. The Contractor should review the Statewide IT Policies, Procedures, & Standards and ensure their proposed solution meets all standards therein.

Transfer of Secure Information

Secure information must be shared exclusively via the State's standardized data transmission technologies. The State has robust and comprehensive data transmission standards that operate enterprise wide, auth and API-led strategies for the State. The Contractor's solution must support the State's standard API and file transfer methods to facilitate secure data transmission. The State's standardized data

transmission technologies are the MuleSoft API Management and GoAnywhere Managed File Transfer (MFT) services. See <https://www.in.gov/iot/policies-procedures-and-standards/applications-standards/>.

Assistive Technology Compliance Requirements

All state systems must comply with Indiana Code § 4-13.1-3 and the IN.gov Accessibility Policy by following the Web Content Accessibility Guidelines (WCAG) 2.1, ensuring that digital services are accessible to individuals with disabilities, including those relying on assistive technologies. Vendors are required to ensure any hardware, software, or services provided to or purchased by the State are compatible with the principles and objectives of the Assistive Technology Standard within the [Statewide IT Policies, Procedures, & Standards](https://www.in.gov/iot/policies-procedures-and-standards/) (<https://www.in.gov/iot/policies-procedures-and-standards/>). If any deviation from these requirements is necessary, prior written approval must be obtained from the Indiana Office of Technology (IOT), as no exceptions to these standards are allowed without formal authorization.

Compliance & State Standards

The Contractor agrees that all hardware, software, services, and digital content provided under this engagement will conform to the State's Information Security Framework, Assistive Technology requirements (WCAG 2.1 AA / Section 508), and State architectural standards. Any deviation requires prior written approval from IOT. Respondent will sign an NDA to access the Information Security Framework and ensure the proposed solution meets all applicable standards. The State's Standards can be found at this link: <https://www.in.gov/iot/policies-procedures-and-standards/>.

Artificial Intelligence Standards

The State has adopted an enterprise-level policy governing the use of Artificial Intelligence (AI) within state government. The State's AI Policy is issued and monitored by the Office of the Chief Data Officer (OCDO), in cooperation with the Chief Privacy Officer (CPO) and the Management Performance Hub (MPH). As a complement to the AI Policy, the State Agency Artificial Intelligence Systems Standard outlines the rationale behind the AI Readiness Assessment Process required for the implementation or any use of AI by a state agency. That Standard outlines the requirement for the submission of a Readiness Assessment Questionnaire prior to implementation or use of an AI tool or system. Any proposed solution meeting these requirements must support the State's AI Policy and follow the AI Readiness Assessment Process. See <https://www.in.gov/mph/AI/> for more detailed information.

Security Incident Response

The Contractor shall provide incident response process documentation covering ticketing, escalation, timelines for State notification, and reporting of resolved incidents including root cause analysis and lessons learned for major incidents.

Business Continuity/Disaster Recovery (BC/DR)

The Contractor shall maintain and share with the State a Disaster Recovery Plan and a Business Continuity Plan for operations supporting this program, updating annually. Plans may include trade-secret content protected under APRA and are exempt from public disclosure per IC 5-14-3-4(a),(b)(10),(11),(19). The vendor should follow the State's [Enterprise Resiliency Policy](https://www.in.gov/iot/files/P.08_Enterprise_Resiliency_Policy_32520261228PM.pdf) (https://www.in.gov/iot/files/P.08_Enterprise_Resiliency_Policy_32520261228PM.pdf).

Accessibility of Training Materials

All training materials (slides, PDFs, LMS modules, videos, assessments) and digital content must conform to WCAG 2.1 AA and be maintained accordingly. The DOJ's Title II rule is effective for state government in April 2026; the Contractor must evidence regular accessibility auditing and remediation workflows.

VII. KEY PERFORMANCE INDICATORS

The State will use Key Performance Indicators (KPIs) to measure performance and outcomes of the Contract. The specific KPIs and their targets will be defined and agreed upon by the State and the Contractor during the initial phases of the requirements under the Contract. At a minimum, on time delivery at quality standards of the scope provided within the budget set forth in the Contract will each be measured. Additionally, the State will collect a modified Net Promoter Score from customers to this Contract in its discretion. Low ratings on the modified Net Promoter Score or failure to meet any other KPIs may be deemed, at the discretion of the State, to constitute default under the Contract.

VIII. END OF CONTRACT TRANSITION AND TURNOVER

Vendor will hand over all reports and analyses at the end of contract. Vendor will ensure the secure deletion/destruction of all IDOE-owned data and provide confirmation of said deletion/destruction.

- The vendor shall develop a turnover plan 6 months prior to contract end, detailing activities for transferring responsibilities, non-proprietary components, data, and operational documentation to the State or its agent.
- The vendor shall maintain mutually agreed upon staffing levels during turnover and commence training and shadowing four months prior to contract end for staff who will assume operations. The State will approve the designated Turnover Manager.
- The vendor shall provide a knowledge transfer checklist (for example procedures, contacts, training materials) and deliver a data disposition certificate confirming deletion or return of State data within six months after contract completion unless otherwise agreed.