

STATE OF TEXAS §  
COUNTY OF TRAVIS §

Division Number: 213-College & Career & Military Prep	Program Name: GEAR UP Technical Assistance
Org. Code:	Legal/Funding Authority: HEA of 1996
Speed Chart:	Amended by PL 105-244; RFP 701-15-012
Payee Name: Univ. of Texas at Austin- Institute for Public School Initiatives (IPSI)	Contract #: 3245
PAYEE ID: 3721721721	PO #: 35708

Amendment No. 5

**AMENDMENT TO  
STANDARD CONTRACT  
BETWEEN  
TEXAS EDUCATION AGENCY  
AND**

**The University of Texas at Austin- Institute for Public School Initiatives (IPSI)**  
NAME OF CONTRACTOR

It is mutually understood and agreed by and between the undersigned contracting parties of the above numbered contract to amend as follows:

**ARTICLE III. PURPOSE**

Contractor will perform two additional tasks of coordinating and conducting Annual Strategic Planning Report (ASPR) planning days for cohort district teams, and coordinating and implementing college and financial aid admissions training for school counselors as stated in *Exhibit A, Revised Description of Services* herein attached and incorporated into the contract.

**ARTICLE IV. PAYMENT UNDER CONTRACT**

This amendment increases the contract by \$139,425.00 for services rendered between 9/1/2016 through 8/31/2017. The total contract amount for this contract period will not exceed \$2,070,000.00 as specified in *Exhibit B, Revised Budget* herein incorporated into the contract.

Contract Amount FY 15-17	\$ 5,092,463.00
Amendment Amount	\$ 139,425.00
Contract Total	\$ 5,231,888.00

It is agreed and accepted by a person authorized to bind Contractor that all Terms and Conditions of the original contract and amendments are effective on the signature date of this contract.

Typed Name: David Hawkins  
Typed Title: Associate Director - OSP


 5.3.17  
Authorized Signature

**THIS SECTION RESERVED FOR AGENCY USE.**

I, an authorized official of Agency, hereby certify that this contract is in compliance with the authorizing program statute and applicable regulations and authorize the services to be performed as written above.

AGREED and accepted on behalf of Agency this 5 day of May 2017 (month/year) by a person authorized to bind Agency.

Return signed copy to:  
[TEAContracts@tea.texas.gov](mailto:TEAContracts@tea.texas.gov)

  
Mike Morath  
Commissioner of Education

## **Exhibit A**

### **Revised Description of Services (4/17/2017)**

#### **Requirements (Revision in Bold)**

UT-IPSI will work with TEA to ensure timely and effective development, implementation, and dissemination of the following minimum project requirements:

1. Provide technical assistance and support for participating Texas GEAR UP districts and partnership grants by:
  - Conducting a formal needs assessment a minimum of once per school year for each participating district in the state grant.
    - i. Developing strategic planning reports based upon the results of the needs assessments (subtask of above Task)
  - Monitoring grant implementation, including student cohort participation and progress toward grant goals and objectives.
    - i. Providing on-going, individualized targeted technical assistance geared towards the needs of each district
  - Identifying and addressing the needs of non-participating students and work with districts to mitigate any barriers to full participation.
  - Supporting and assisting the district coordinator and district and campus leaders with program implementation, operation, and sustainability efforts.
  - Coaching, training, and supporting district and grant staff in grant implementation; data management; data-driven intervention planning; and student, community, and parent outreach strategies.
  - Meeting with district administrators and campus teams a minimum of once per month to provide timely updates and discuss progress on action plans based on ongoing monitoring
  - Creating and employing tools, including a student-based state grant data collection and reporting system and annual strategic planning reports to provide timely, data-driven feedback for districts and providers to ensure that the project is implemented with fidelity.
  - Training districts in the use of the student-based data collection and reporting system and analytics to further the goals of the Texas GEAR UP state grant by providing quality assurance services to districts so that data are recorded correctly and providing analysis to districts and to the state office regarding trends in participation prior to the end of the year. This includes establishment and documentation of clear processes and procedures for the district to follow in relation to the collection and reporting of data into the data collection and reporting system and the establishment of clear processes for outreach in educating the grantees about the data elements (including expectations and timelines).
  - Implementing the College Advisor component as described in the Texas GEAR UP approved federal grant application.
  - Increasing focus on family engagement and support family engagement specialists at the campus level and statewide.
  - Providing professional development opportunities for cohort educators in differentiated instruction, project-based management, advanced instruction, and classroom management.
  - Overseeing contractual services to districts required through the federal application, including, but not limited to, services of the Texas Guaranteed Student Loan Corporation.
    - i. Creating appropriate, efficient and cost-effective partnerships at the state level to assist with technical assistance outreach efforts
  - Providing ongoing information and guidance to Texas school districts regarding GEAR UP initiatives, including: college access and preparation strategies, GEAR UP promising practices, and Texas GEAR UP online resources
    - i. Developing content and materials to be used by schools for educator professional development, post-secondary planning, financial literacy, mentoring, and family engagement.
  - Assist districts and coordinators with administering the fall and spring surveys developed by the external evaluator at ICF.

2. Provide support for the GEAR UP state office by:
  - Responding to inquiries from the public, including individuals seeking GEAR UP employment or volunteer opportunities and education vendors seeking contractual opportunities
  - Identifying and ensuring attendance of appropriate personnel at the National Council for Community and Education Partnerships (NCCEP/GEAR UP) or U.S. Department of Education Office of Post-secondary Education conferences, ensuring equitable representation across the participating districts, new attendees per conference opportunity, and compliance with federal regulations
  - Developing and maintaining a student-based data collection system that includes all data required and requested by TEA in furtherance of accurately completing required reports and meeting all requirements of the Texas GEAR UP program evaluation. This requires collaboration with TEA and the evaluation vendor to develop the specifications for the annual performance reporting and evaluation-specific data.
  - Establishing and documenting clear processes and procedures for validating grantee-reported data for missing and anomalous data
  - Providing data analysis from the student-based data collection and reporting system used by Texas GEAR UP districts regarding trends in participation
  - Modifying the student-based data collection system on an ongoing basis as the evaluation plan is refined each year
  - Completing the appropriate federal Annual Performance Report (APR) sections as identified by TEA and the evaluation vendor
  - **Coordinating and conducting ASPR planning days for cohort district teams**
  
3. Provide support for college and career awareness statewide by:
  - Participating in planning activities for Texas GEAR UP product development for the creation of student, educator, and parent resources to better help meet statewide college access and preparation needs, including additional content for Texas GEAR UP online sites.
  - Coordinating the planning and execution of the annual Texas GEAR UP State Conference.
  - Coordinating and convening four annual Texas GEAR UP Coalition meetings, ongoing GEAR UP Coalition communications, and two annual Texas GEAR UP district and partner meetings.
  - Coordinating and implementing a Texas GEAR UP summer camp for cohort students and partner programs.
  - Communicating and coordinating with the state office regarding creation of resources to further the state's success in meeting district needs.
  - **Coordinating and implementing college and financial aid admissions training for school counselors.**

### **Deliverables**

UT-IPSI will deliver the following:

- Strategic planning report, including a needs assessment for each participating district on a yearly basis
- Action plan, to be included in the strategic planning report, reflecting steps to be taken during the contract period based on the individual districts' needs assessment
- Monthly reports to TEA that include district monitoring data, evidence of progress toward goals/deliverables and any new supports initiated, agendas and attendee lists from monthly meetings with districts, and information on GEAR UP inquiries from the public and others (name, affiliation, discussion, etc.)
- Quarterly reports on district progress on performance indicators from the data collection and reporting system
- Timely completion of the federal APR as required and in conjunction with the TEA and the evaluation vendor
- Calendar of events to include the four annual Texas GEAR UP Coalition meetings, two annual Texas GEAR UP district and partner meetings
- Timeline for data collection and reporting to include ample time for reviewing and finalizing data while meeting TEA deadlines
- Annual report on the results of the Texas GEAR UP State Conference workshop and conference evaluations

- Action plan for participating in the creation of student, educator, and parent resources including timelines
- Action plan for addressing GPRA goals not being met
- Regularly updated data system documentation including, at a minimum, definitions for each item collected, variable and table relationships, and definitions for performance measure calculations
- Maintenance and development of web-based and face-to-face training for districts on data collection, entry and analysis
- **Annual Strategic Planning Report Planning day with districts**
- **Provide opportunity for training for counselors in financial aid and college admissions processes**

*\*TEA reserves the right to alter or add further deliverables as the project progresses*

**Exhibit B**  
**Revised Budget (4/17/2017)**

<b>Category</b>	<b>Original Budget</b>	<b>Current Amendment</b>	<b>Reason</b>	<b>Revised Budget</b>
Salaries	918,890.00	56,354.00	Addition of 8 <sup>th</sup> advisor and conference and summer camp staff	975,244.00
Fringes	274,243.00	19,006.00		293,249.00
Social Solutions Global, Inc. (GUIDES)	14,000.00			14,000.00
Signal Vine		10,500.00	New contract with text provider	
TACAC (Counselor training)	1.00			
PIQUE (Family training)	15,000.00			15,000.00
TG (Financial literacy)	5,000.00			5,000.00
Focus Training		33,920.00	For summer camp curriculum and training	
GO9 Media (materials and design)	1.00			
M, O, & E (50)	65,415.00	15,140.00	Increase in size and scope of activities and services	80,555.00
Meeting and Event Costs	89,000.00	16,000.00	Increase conference hotel costs	105,000.00
Communication Device Allowances (CDA)	12,960.00			12,960.00
Conference Speakers/Summer Trainers/Professional Development/School Support	171,560.00		Decrease to move funds to salaries and other contracts	126,400.00
Travel/Other Operating	221,500.00	24,000.00	Increase to cover additional costs	245,500.00
<b>Total Direct Costs (DC)</b>	<b>1,787,570.00</b>	<b>129,760.00</b>		<b>1,908,408.00</b>
Indirect Costs (IDC)				
DC excluded from IDC Calculation	0	8,920.00		8,920.00
Modified Total Direct Cost (DC-Exclusions)	1,787,570.00	120,840.00		1,908,408.00
<b>Indirect Costs (IDC) = IDC Rate (8%) MTDC (no exclusions)</b>	<b>143,005.00</b>	<b>9,667.00</b>		<b>152,672.00</b>
<b>Total Project Costs (TC) = DC + IDC</b>	<b>1,930,575.00</b>	<b>139,425.00</b>		<b>2,070,000.00</b>