

STATE OF TEXAS §  
COUNTY OF TRAVIS §

Division Number: 315	Program Name: System of Great Schools Toolkit and Diagnostics
Org. Code:	Legal/Funding Authority: Rider 47, GM 841h Legislature; RFP701-17-027
Speed Chart:	
Payee Name: Mass Insight Education	Payee ID: 10433696878
ISAS Contract #: 3707	PO #: 36423

Amendment No. 01

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

Mass Insight Education and Research Institute

It is mutually understood and agreed by and between the undersigned contracting parties of the above numbered contract to amend said Contract effective August, 2017 as follows:

**ARTICLE II. PERIOD OF CONTRACT**

An Amendment is required to decrease budget amount.

**ARTICLE IV. PAYMENT UNDER CONTRACT**

A detailed revised budget Attachment 1 and Task Activity Plan, Attachment 2, are attached,

Contract Amount	\$ 244,102.00
Amendment Amount	\$ - 66,000.00
Contract Total	\$ 178,102.00

Texas Government Code §2252.901 prohibits the agency into entering into an employment contract, a professional services contract, or a consulting services contract with a former or retired TEA employee before the first anniversary of their last date of regular employment. If TEA enters into a "professional services" contract with a corporation, firm, or other business entity that employs a former or retired employee during the first year of the past employee's departure from the agency, the former or retired employee is restricted from performing services on projects that the employee worked on while employed at TEA.

Texas Government Code §572.069. CERTAIN EMPLOYMENT FOR FORMER STATE OFFICER OR EMPLOYEE RESTRICTED. A former state officer or employee of a state agency who during the period of state service or employment participated on behalf of a state agency in a procurement or contract negotiation involving a person may not accept employment from that person before the second anniversary of the date the officer's or employee's service or employment with the state agency ceased.

Effective 01/01/17, the mileage reimbursement rate is 53.5¢ and the previous rate 1/1/16- 12/31/16 was .54¢. The Comptroller's website for travel rules and regulations – textravel: <https://fmxcpa.state.tx.us/fmxcpa/travel/textravel/index.php>. Receipts must be made available for programmatic or financial audit, by TEA and by others authorized by law or regulation to make such an audit, for a period of not less than seven years.

Updated Contract Terms and Conditions dated May 22, 2017 are attached and incorporated herein.

All other terms and conditions of the original contract and amendments remain the same and are incorporated herein as if specifically written.

It is agreed and accepted by a person authorized to bind Contractor that all Terms and Conditions of this Amendment are effective commencing on the above date.

Typed Name: Andrea Wolfe  
Typed Title: Engagement Manager

  
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 27<sup>th</sup> day of August, 2017 (month/year) by a person authorized to bind Agency.

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

  
Kara Belw, Deputy Commissioner Finance  
Administration

## Attachment 1, Revised Budget August FY2018

### COST PROPOSAL

Expense Description	Schedule of Task Completion		Original Budget	Amended Budget
	Deliverables	Timeframe		
<b>1. DSSI- MIE Project Kick-Off Planning Retreat (conducted during same trip as training sessions)</b> <ul style="list-style-type: none"> <li>Staff time: 1-day Vice President level time (VP) (Larry Stanton), 2 days Engagement Manager (EM)(Andrea Wolfe), 1 day Program Manager (PM) (Dylan Rudy)</li> <li>Material and national support costs</li> </ul>	Meeting agendas, planning documents, finalized project timeline	By April 21 <sup>st</sup>	<b>\$3,200</b>	<b>\$3,200</b>
<b>2. SGS District Summit Support and Session Facilitation</b> <ul style="list-style-type: none"> <li>Staff time: 3 days VP (Larry Stanton), 3 days EM (Andrea Wolfe), 1 days PM</li> <li>Travel Costs (airfare, transportation) for 2 staff members</li> <li>Material and national support costs</li> </ul>	Training materials: agendas, ppts slides, handouts	By April 28 <sup>th</sup>	<b>\$9,000</b>	<b>\$9,000</b>
<b>3. Execute District Readiness Assessments</b> <ul style="list-style-type: none"> <li>Diagnostic cost per LEA = \$22,000</li> <li>Cost includes MIE team time to complete diagnostic pre-visit activities, on-site execution, and findings synthesis in a final report</li> <li>Travel costs (airfare, hotel, transportation)</li> <li>Material and national support costs</li> </ul>	Diagnostic visit calendar, District final reports	Site visits conducted by June 9 <sup>th</sup> ; reports completed by June 16 <sup>th</sup>	<b>\$220,000</b>	<b>\$154,000</b>
<b>4. SGS Network Trends Analysis</b> <ul style="list-style-type: none"> <li>Staff time: 0.5-day VP (Larry Stanton), 1 day EM (Andrea Wolfe), 3 days PM (Dylan Rudy)</li> <li>Material and national support costs</li> </ul>	Cross district trends analysis report	By July 7 <sup>th</sup>	<b>\$2,300</b>	<b>\$2,300</b>
<b>5. Conduct After-Action Review of SGS District Readiness Assessment Tools and Process and Revise/Refine Tools</b>	After action review meeting materials, final, revised	After action review conducted by July 21 <sup>st</sup> ; final materials	<b>\$9,602</b>	<b>\$9,602</b>

<ul style="list-style-type: none"> <li>• Staff time: 2 days VP (Larry Stanton), 3 days EM (Andrea Wolfe), 6 days PM</li> <li>• Travel Costs (airfare, hotel, transportation) for 3 staff members</li> <li>• Material and national support costs</li> </ul>	diagnostic tools (rubric, survey, interview and focus group question bank, report template)	completed by August 31 <sup>st</sup>		
<b>TOTAL:</b>			<b>\$244,102</b>	<b>\$178,102</b>

## **ATTACHMENT 2, Fy2018 TASK ACTIVITY PLAN**

	Key Activities and Sub Tasks	Deliverables	Responsible	Timeline
1.	<b>Conduct DSSI- MIE Project Kick-Off Meeting</b> <ul style="list-style-type: none"> <li>Schedule kick-off on-site meeting and prepare meeting materials: agenda, planning documents</li> </ul>	Meeting agenda, planning documents, finalized project timeline	Andrea Wolfe	April 15 <sup>th</sup> - 21 <sup>st</sup>
2.	<b>SGS District Summit Support and Session Facilitation</b> <ul style="list-style-type: none"> <li>Develop and facilitate a session focused on the district readiness assessment findings. The session will provide opportunities for individual district to reflect on their report findings, and opportunities for districts to collaborate and engage across the network.</li> <li>Develop training materials: ppts, handouts, etc.</li> <li>Participate and support summit execution.</li> </ul>	Summit session facilitation materials: agendas, ppts slides, handouts	Andrea Wolfe	June 27 <sup>th</sup> -28 <sup>th</sup>
3.	<b>Execute District Readiness Assessments (7 diagnostics)</b> <ul style="list-style-type: none"> <li>Schedule diagnostic on-site visits with all districts</li> <li>Determine diagnostic team composition for each visit (MIE staff, DSSI staff, Executive Advisors, etc.)</li> <li>Ensure completion of all pre-visit activities for all diagnostics</li> <li>Conduct onsite diagnostic activities (surveys, focus groups, interviews) for all districts</li> <li>Synthesize findings and draft final reports</li> <li>Respond to district questions and comments regarding reports and findings</li> </ul>	Diagnostic visit calendar, District final reports	Andrea Wolfe	April 15 <sup>th</sup> - June 9 <sup>th</sup> : Plan for and complete on-site diagnostic visits  June 16 <sup>th</sup> : Deliver final reports

	Key Activities and Sub Tasks	Deliverables	Responsible	Timeline
4.	<b>Develop and Share Cross-District Diagnostic Findings Trends Analysis</b> <ul style="list-style-type: none"> <li>Examine diagnostic findings and reports for all participating districts and identify cross-district strengths, challenges and opportunities</li> <li>Draft report outlining network trends</li> <li>Share report with DSSI</li> </ul>	Cross district trends analysis report	Andrea Wolfe	June 26 <sup>th</sup> - July 7 <sup>th</sup>
5.	<b>Conduct After-Action Review of SGS district readiness assessment tools and process</b> <ul style="list-style-type: none"> <li>Plan and draft after action review meeting materials</li> <li>Facilitate after action review session with DSSI, MIE diagnostic team, and other stakeholders involved in the process</li> <li>Generate next steps for tool and process refinement</li> </ul>	After action review meeting materials, next steps document outlining areas for tool and process refinement	Andrea Wolfe	July 10 <sup>th</sup> - July 21 <sup>st</sup>
6.	<b>Revise Diagnostic Tools</b> <ul style="list-style-type: none"> <li>Revise diagnostic tools and process based on after action review next steps</li> <li>Gather DSSI feedback to revisions</li> <li>Finalize tools</li> </ul>	Final, revised diagnostic tools (rubric, survey, interview and focus group question bank, report template)	Andrea Wolfe	July 24 <sup>th</sup> - August 4 <sup>th</sup> : initial revisions and feedback round  August 7 <sup>th</sup> – August 14 <sup>th</sup> : Incorporate feedback  August 15 <sup>th</sup> – August 31 <sup>st</sup> : Present finalized tools to DSSI and train staff on major changes

**SAM Search Results**  
**List of records matching your search for :**

**Search Term : mass\* insight\* education\***  
**Record Status: Active**

<b>ENTITY</b>	Mass Insight Education and Research Institute, Inc	Status:Active
DUNS: 940017122	+4:	CAGE Code: 415Z1 DoDAAC:
Expiration Date: Nov 29, 2017	Has Active Exclusion?: No	Debt Subject to Offset?: No
Address: 18 Tremont St Ste 1010		
City: Boston	State/Province: MASSACHUSETTS	
ZIP Code: 02108-2316	Country: UNITED STATES	