



TEXAS EDUCATION AGENCY
DELIVERABLES-BASED INFORMATION TECHNOLOGY SERVICES (DBITS)
STATEMENT OF WORK (SOW)

RFO #701-14-018

New Generation System (NGS) Help Desk

PROPOSAL DELIVERY LOCATION: Purchasing & Contracts Division Texas Education Agency, 1701 N. Congress Ave., Rm. 2-125 Austin, TX 78701-1494	REFER INQUIRIES TO: Debra Rosas TEAContracts@tea.state.tx.us
---	---

**WITHOUT EXCEPTION - RESPONSE MUST BE TIME AND DATE STAMPED BY THE TEA
PURCHASING & CONTRACTS BEFORE:
Thursday, September 5, 2013 – 3:00 PM, Central Time**

Pursuant to the Provisions of the Texas Government Code Title 10 Subtitle D Chapter 2156.121 – 2156.127, sealed responses will be received until the date and time established for receipt. After receipt, names, prices and other response details may only be divulged after award of a contract, if a contract is awarded. The award notice will be posted to the Electronic State Business Daily at <http://esbd.cpa.state.tx.us/>.

All written requests for information will be communicated to all applicants known to the Agency.

All responses shall become the property of the State of Texas upon receipt.

All responses must be delivered to the Texas Education Agency Purchasing & Contracts as required by the instructions within this request. All addenda to and interpretation of this solicitation shall be in writing. The State shall not be legally bound by an addenda or interpretation that is not in writing.

Contractor understands and agrees that no public disclosures or news releases pertaining to this RFO, subsequent award, or any results or findings based on information provided or obtained to fulfill requirements of this RFO shall be made without prior written approval of TEA.

NOTE: Failure to formalize the terms of the response by signing the Execution of Offer (Attachment E) will result in disqualification of the offer contained within the bid package.

Table of Contents

1.	Introduction	5
2.	Background	5
3.	Description of Services	6
3.1.	Project Management	6
3.2.	Technical Support	6
3.3.	Help Desk Services	7
4.	Reports and Meetings	7
5.	Service Level Agreement	8
5.1.	Production Operation Requirements	8
6.	Period of Performance	8
7.	Invoices	8
8.	Contractor Work Hours	8
8.1.	Transition Period	8
8.2.	Family Educational Rights and Privacy Act (FERPA)	9
9.	Contractor Response	9
9.1.	Format and Content	9
9.1.1	Response Cover Page	9
9.1.2	Response Checklist	10
9.2.	Understanding of the Project	10
9.3.	Management Plan	10
9.4.	Subcontracts	11
9.5.	Personnel Resources	11
9.6.	References—Past Performance	11
9.7.	Access to Confidential Information	11
9.8.	Contractor Identification	12

10. Pricing 12

11. Response Submission Requirements 12

 11.1. Quantity of Response Copies 13

 11.2. Tentative Sequence of Events/ Critical Dates 13

 11.3. Requests for Additional Information 13

 11.4. Standard Response Requirements 14

 11.5. State Not Responsible for Preparation Costs 14

 11.6. Disclosure of Offer Content 14

 11.7. Review of Responses 14

Attachment A – Response Cover Page

Attachment B – Pricing Proposal

Attachment C – Access to Confidential Information

Attachment D – Vendor Guide

Attachment E – Execution of Offer

APPENDIX C

STATEMENT OF WORK (SOW)

FOR

DELIVERABLES-BASED INFORMATION TECHNOLOGY SERVICES

New Generation System (NGS) Help Desk

Texas Education Agency

August 23, 2013

Appendix C
Statement of Work (SOW)
for Deliverables-Based Information Technology Services (DBITS) Contract
New Generation System (NGS) Help Desk
Texas Education Agency

1. Introduction

It is the intent of the Texas Education Agency (TEA) to solicit proposals to provide a New Generation System (NGS) Help Desk in accordance with all requirements stated herein.

The New Generation System (NGS) is a web-based interstate information network that communicates demographic, educational and health data on migrant children to educators throughout the nation.

The NGS system is designed to capture educational and health data on migrant children. The system allows educators to record the movement of migrant students through the educational process by producing on-line records of a student's educational progress and health profile. Educators can generate a student transfer document to facilitate academic placement as the student transfers schools. NGS also allows educators to generate various student-level, management and federal performance reports. Plans are to electronically upload data from NGS into the new national Migrant Education Program (MEP) student record system, the Migrant Student Information Exchange (MSIX) operated by the U.S. Department of Education (USDE).

The NGS Help Desk is responsible for providing technical assistance to NGS End-users both within, and outside of, the State of Texas regarding the use of NGS and MSIX. Persons responsible for operating the NGS Help Desk must demonstrate a thorough knowledge and understanding of the Migrant Education Program, the New Generation System, and MSIX. The current NGS website is <http://ngsmigrant.com/>

Eligible Respondents are Contractors with an approved DIR Deliverables-Based Information Technology Services (DBITS) contract in the category of 'Application Maintenance and Support'.

2. Background

The establishment of the New Generation System (NGS) began with a vision of what such a system should do for teachers, health providers, counselors, families, and administrators in creating an optimum educational environment for migrant students. NGS addresses the immediate need of record/text data transfer, yet addresses the need to communicate relevant and authentic information on students in an efficient and real-time manner.

The NGS group involves several stakeholders that include a NGS Management Team, a NGS Advisory Committee, and the NGS Staff. The Contractor selected as a result of this RFO will be guided by the direction of the NGS Management Team, the NGS Advisory Committee, and NGS Staff.

The NGS Management Team is comprised of State Directors of Migrant Education. The NGS Management Team governs the policies, size, and scope of NGS activities, taking into account input from the NGS Advisory Committee and NGS Consortium States. This includes priorities for design, development, implementation and evaluation. Members of the Management Team advocate for the NGS and prepare the marketing strategies, provide direction to the fiscal agent to ensure that the financial requirements are met, and set participation standards. The Management Team Chairpersons work with NGS Managers to review progress of work, identify needs, and ensure communication with Consortium Members and the Advisory Committee.

The NGS Advisory Committee has membership from state, regional, and local levels. The Advisory Committee acts within the parameters of a plan including size, scope and priorities approved by the Management Team. The NGS Advisory Committee's major role is to communicate the program design, development and implementation needs of Consortium States to the NGS Management Team. This includes, for example, technical assistance regarding the programmatic content of the system. Advisory Committee members provide recommendations to the Management Team as to the services to be offered through NGS, including technical assistance and training for Member States. The Committee receives input from different perspectives, such as instructional staff, paraprofessionals, technicians, NGS users, administrators, parents, students, and the community. The principle objective is to respond to user needs. Additionally, the Advisory Committee reviews emerging technologies to maintain the state-of-the-art system. The Chairperson of the NGS Advisory Committee is Brenda Pessin, Illinois.

3. Description of Services

Selection of the Contractor includes an evaluation of the Contractor's approach and methodology for performing the services described below.

3.1 Project Management

- Provide full-time project management support of the combined NGS help desk / development and maintenance functions.
- Provide project oversight, monitoring and recommendations to validate that the NGS help desk is executed in accordance with TEA and NGS Consortium requirements.
- Design and develop an electronic call tracking system to record the quantity, type and status of calls received at the help desk.
- Meet twice a month with the TEA Migrant Education Director, or designee(s), through onsite meetings or telephone conferences, to provide project status and regular communication.
- Monitor NGS data entered by End-users.
- Provide toll free number, fax number, and email inbox for NGS Help Desk to be operational by October 1, 2013.

3.2 Technical Support

- Provide full time support of the help desk hardware, and software infrastructure.
- Provide NGS ad hoc reports required by TEA, Consortium Member States, and NGS End-users.
- Assist TEA, NGS Consortium Member State and NGS End-users with usage of the Report Generator function on NGS.
- Provide Beta testing of the NGS application changes and builds, and document feedback to TEA and NGS Programmers.
- Monitor potential duplicate students by creating monthly potential duplicate student reports, notifying end-users of potential duplicates, overseeing merge process and providing electronic feedback to TEA on potential duplicates and on students merged.
- Create, install, and maintain help desk call tracking software which will be used to provide monthly Help Desk Reports that will log the number and status of NGS and MSIX calls received at the NGS Help Desk.

- Assist NGS Programmers and TEA by working with NGS reports to assist in MSIX interface efforts.
- Assist TEA with MSIX data validation, password issuance, training and other duties as they arise.
- Assist TEA with password maintenance for NGS and MSIX.

3.3 Help Desk Services

- Answer the NGS Help Desk toll-free number from the hours of 8:00 a.m. to 5:00 p.m. Central Time during the normal TEA business calendar schedule.
- Use call tracking software to record the number and status of calls made to the NGS Help Desk. Provide monthly reports to TEA in agreed upon format.
- Monitor the NGS Help Desk mailbox. Provide monthly reports to TEA in agreed upon format.
- Answer NGS End-user(s) questions about the NGS and MSIX application.
- Resolve NGS End-user(s) issues with NGS and MSIX application errors.
- Escalate unresolved NGS and MSIX application problems to the NGS Programmer Development Team.
- Provide regularly scheduled NGS application training sessions via internet and voice conference calls on a bi-weekly basis.
- Develop, maintain and update along with system builds, an NGS User Manual according to TEA specifications.
- Provide an NGS Trainer for Texas and Consortium States who is knowledgeable about the Texas MEP and the NGS web-based application and End-user requirements. NGS Trainer will train on-site, as requested, Education Service Centers (ESC) and other NGS End-users as specified by designated TEA staff, including participating in the development of the annual NGS training for ESCs, as needed. This trainer will also create training webinars as needed or as requested by TEA.
- Other related duties as assigned by TEA.

4. Reports and Meetings

- Provide monthly help desk reports recording the quantity, type and status of calls to TEA in agreed upon format.
- Provide monthly NGS help desk mailbox reports to TEA in agreed upon format.
- Provide monthly documentation regarding the regularly scheduled NGS application training sessions via internet and voice conference calls.
- Deliver NGS User manual according to TEA specifications by May 1, 2014, and update as needed, on an ongoing basis.
- Provide semi-annual report of NGS Ad hoc reports developed for TEA, Consortium Member States and NGS End-users.
- Provide semi-annual report detailing activities of the NGS Trainer for Texas and Consortium States.

5. Service Level Agreement

All current system functions must be maintained and new features added, if applicable, while meeting the production operation requirements listed below.

5.1 Production Operation Requirements

- Workday availability requirement (Central Time Zone): 8:00 a.m. – 5:00 p.m., Monday through Friday – 100% of time. The awarded Contractor's team must maintain coverage over the lunch hour.
- Other requirements: If system down time for maintenance is required outside of the normal scheduled maintenance window (5:00 p.m. Friday to 12:00 a.m. Monday), the TEA Migrant Education Director or designee must approve and notification of down time must be scheduled in advance.

6. Period of Performance

The term of any contract resulting from this RFO shall be from contract award until August 31, 2014. TEA, at its own discretion, may extend any contract awarded pursuant to this SOW for up four (4) fiscal years under the same or different terms subject to appropriation of funds by the Texas Legislature for the project. If the contract is renewed, each renewal period shall be from the Agency's fiscal year which is from September 1 – August 31.

If a contract resulting from this SOW is awarded to a new Contractor rather than to the current Contractor, then a four (4) week transition period will be required at the beginning of the contract. This is necessary to ensure a smooth transition from the current Contractor supporting the NGS Help Desk to the new Contractor.

7. Invoices

The awarded Contractor shall submit the Services Delivered Report to the TEA Migrant Education Director within the first two (2) working days of each month as described in the TEA Vendor Guide. Once the TEA Migrant Education Director or designee(s) has approved the Services Delivered report, then the Awarded Contractor shall submit an invoice in the same format. The invoice shall be emailed to TEA Accounts Payable, TEAAccountsPayable@tea.state.tx.us or mailed to the address below:

Texas Education Agency
Accounts Payable Division, Rm. 2-130
1701 North Congress Avenue
Austin, TX 78701-1494

8. Contractor Work Hours, Transition and FERPA

The awarded Contractor staff is required to be on-site every day from 8:00 a.m. to 5:00 p.m. Central Time on regular State business days unless the Awarded Contractor makes prior arrangements with the TEA Migrant Education Director or designee(s). The schedule of State holidays for fiscal year 2014, ending on August 31, 2014, is available at <http://sao.hr.state.tx.us/Compensation/holidays.html>. Occasional late night and weekend technical support may be required to fulfill the requirements specified in this SOW.

8.1 Transition Period

In the event a subsequent competitive solicitation is awarded to a New Contractor, the Outgoing Contractor shall hand-over to the New Contractor all "works" including but not limited to the following: data, materials, database access, intellectual property, source code, training materials, access to websites, asset transfer, and maintenance of service commitments. The purpose of transition planning is to ensure a seamless and continuous service when changing from one contract to another. The Outgoing

Contractor will begin shipping, transmitting or providing access to all appropriate materials and data to the New Contractor within ten (10) days of announcement of award at the New Contractor's expense for data processing and production, packing and shipping. The Outgoing Contractor will be responsible for providing the services identified in the Contract until all records have been completely transferred to the New Contractor. The Outgoing Contractor is responsible for performing due diligence to ensure that all the transition activities are identified and completed during the Contract Transition.

The Outgoing Contractor shall submit to TEA requested reports and data. TEA will not release the final invoice until all materials are returned to TEA or their designee. The TEA Project Manager shall approve the Transition Plan prior to its implementation. The Transition Plan must minimize the impacts on continuity of operations and maintain communication with the TEA Project Manager and the New Contractor.

8.2 Family Educational Rights and Privacy Act (FERPA)

FERPA (20 U.S.C. § 1232g; 34 CFR Part 99) is a federal law that protects the privacy of student education records. The law applies to all schools that receive funds under applicable programs of the U.S. Department of Education. FERPA gives parents certain rights with respect to their children's education records. The rights transfer to the student when he or she reaches the age of 18 or attends a school beyond the high school level. Students to whom the rights have transferred are "eligible students". FERPA outlines the circumstances in which schools are required to have written permission from a parent or eligible student in order to release information from a student's education record. The initial Contractors designed and constructed the application to follow the FERPA guidelines. Any modifications made to applications must also adhere to the FERPA guidelines. Awarded Contractor staff having access to data stored within the applications must protect the confidentiality of the data following FERPA guidelines.

9. Contractor Response

9.1 Format and Content

Responses must be written entirely on 8½" × 11" white paper and must be limited to 100 pages, not including appendices and attachments. Responses should be stapled in the top left corner or, if bound, may be bound in no more than a 3-ring binder. Responses shall include a "Table of Contents" and provide page numbers. Number all pages of the offer sequentially using Arabic numerals (1, 2, 3, etc.). Separate and identify each criterion response to Section 3 of this SOW by use of a divider sheet with an integral tab for ready reference. Responses must be submitted in a manner that does not carry any benefit, keepsake, or value for members of the review panel.

9.1.1 Response Cover Page

Responses should include a cover page that clearly states the name of the firm or organization and the name, position, and telephone number of the Contractor's project administrator whom TEA may contact regarding the response, Attachment A.

9.1.2 Response Checklist

This checklist is to assist Contractors in ensuring that all information is included in their response. Contractors must refer to the appropriate section of the SOW for detailed information on the following.

<input type="checkbox"/>	Response Cover Page	Sec. 9.1.1/ Attachment A
<input type="checkbox"/>	Understanding of the Project	Sec. 9.2
<input type="checkbox"/>	Management Plan	Sec. 9.3
<input type="checkbox"/>	Subcontracts	Sec. 9.4
<input type="checkbox"/>	Personnel Resources	Sec. 9.5
<input type="checkbox"/>	References – Past Performance	Sec. 9.6
<input type="checkbox"/>	Access to Confidential Information	Sec. 9.7/ Attachment C
<input type="checkbox"/>	Contractor Identification	Sec. 9.8
<input type="checkbox"/>	Pricing Proposal	Sec. 10 /Attachment B
<input type="checkbox"/>	TEA Vendor Guide v4.4	Attachment D
<input type="checkbox"/>	Execution of Offer, General Provisions	Attachment E

Failure to return all information on the checklist may disqualify the response

9.2 Understanding of the Project

The response must communicate an understanding and describe the tasks to be performed, and identify potential problems in the conduct of the project and methods to identify and solve such problems.

The Contractor must describe clearly, specifically, and as completely as possible, the methodology for carrying out the objectives and requirements of the project as described in this SOW. The response must describe the project design, project activities, materials, and other products, services, and reports to be generated during the contract period and relate them to the stated purposes and specifications described in the SOW. The Contractor must append technical evidence relating to the Contractor's ability to perform the proposed services to the response. This evidence is intended to provide TEA with examples of how the Contractor's staff proposed for the contract provided similar services on past engagements and how they will utilize that experience to perform the requirements of the SOW. Failure to meet these conditions shall result in disqualification of the response, and the response shall receive no further consideration.

9.3 Management Plan

Contractor must provide satisfactory evidence of capability to manage and coordinate the types of activities described in the SOW and to produce the specified product or service on time. To provide information on qualifications to accomplish the described tasks, Contractors must include in this section the following information:

- Structure of the organization
- Indications of the ability to perform the tasks described in Section 3
- Names of staff member(s) who will direct the overall project throughout the duration of the contract as well as those of staff members who will coordinate major activities during each phase of the contract and the time allocations that the personnel described will devote to fulfillment of the contract

9.4 Subcontracts

Contractor must identify key partnerships and Subcontractors it intends to leverage for this project, and specify the tasks and activities and the level of responsibility each will have with the project. The Contractor must identify any Subcontractors proposed to work on the project who are Historically Underutilized Businesses (HUBs) as defined in [V.T.C.A., TX Govt. Code, §2161.001](#). Personnel Resources.

9.5 Personnel Resources

An appendix to the response must contain résumés of project staff members. If the résumés include references, TEA will not consider the references in the review. Names given as references must not affect the scoring of the Offer in any way. In addition, the Contractor cannot list employees of TEA in the response as references. The Contractor may list TEA employees in a memo transmitting the response, but not in the response. If the Contractor plans to use external Consultants or Subcontractors, a staff organization and résumés of Consultants and/or Subcontractors must be included.

9.6 References – Past Performance

Contractor must provide at least two (2) applicable project experiences within the past three (3) years similar in size and scope to the one described in this SOW. Contractor must describe the nature of each engagement and include at least two (2) customer reference contacts per project, including current contact information. TEA may give Pre-K thru 12 Education and public sector references additional consideration. For each reference provided, the Contractor must list the following:

- Organization/Company name
- Point of contact with current telephone number and email address
- Project description
- Total contract value
- Key technologies employed (hardware and software tools)
- Date the system was placed in production

TEA will contact references to verify past performance in the following areas:

- Quality of deliverables
- Methodology
- Timeliness/adherence to schedule and budget
- Business conduct
- Problem resolution
- Customer satisfaction

9.7 Access to Confidential Information

During the execution of this SOW, TEA will expose the awarded Contractor to confidential student information and documentation under license to TEA. The awarded Contractor shall read and sign the confidentiality statement at Attachment C, acknowledging the confidentiality requirements of this SOW.

9.8 Contractor Identification

Contractor shall provide to TEA the Respondent’s 9-digit Federal Employer’s Identification Number (FEI); Social Security Number (SSN) if Respondent is an individual or Respondent’s 14-digit State of Texas Contractor’s Identification Number (VIN). If incorporated, Respondent shall also provide to TEA the corporation’s charter number issued by the Texas Secretary of State’s office.

Contractor’s FEI: _____
Contractor’s VIN: _____
Contractor’s SSN: _____
Contractor’s charter number: _____

10. Pricing

The Pricing Proposal (Attachment B) **MUST BE BOUND AND SUBMITTED SEPARATELY FROM THE SCOPE OF SERVICES OFFER.** To demonstrate an understanding of what is included in the Pricing Proposal, Contractors must list in their Pricing Proposal all assumptions used to compile the prices given for the project. It is anticipated that continuation funds will be available for extending the contract. Responses must also include a detailed budget for each state fiscal year through August 31, 2018. Pricing Proposals must be valid for at least 120 working days from date of submittal. Failure to meet these conditions shall result in disqualification of response, and the response shall receive no further consideration.

11. Response Submission Requirements

WITHOUT EXCEPTION TEA PURCHASING & CONTRACTS MUST TIME AND DATE STAMP THE RESPONSE BEFORE:

September 5, 2013 3:00 p.m., Central Time

TEA’s Purchasing and Contracts Division is open Monday through Friday, 8:00 a.m. to 5:00 p.m. Central Time, excluding State of Texas observed holidays. TEA will not consider responses that PURCHASING & CONTRACTS receives after 3:00 p.m. (Central Time) on the closing date. The mailing address is:

Purchasing & Contracts, Rm. 2-125
Texas Education Agency
William B. Travis Bldg.
1701 N. Congress Ave.
Austin, TX 78701-1494

The Contractor must submit responses in a sealed envelope (or box as appropriate) with the Contractor’s name, SOW number, and closing date prominently visible on the envelope/package. If multiple envelopes/boxes are used, the Contractor should indicate on the package “*specific item # of total # of items.*”

TEA will not accept fax transmissions of Contractor’s response under any circumstances.

Discovery of any false statement in the response is a material breach and shall void the submitted response or any resulting contracts, and Contractor may be removed from all Contractor lists maintained by the State of Texas. Regardless of the method of submitting the response—United States Postal Service (USPS), United Parcel Service, Federal Express or any other delivery service—the response must be received in the Agency’s Purchasing & Contracts Division by 3:00 PM (Central Time) on or before the closing date in order to be considered.

Note: TEA WILL NOT accept a USPS postmark and/or round validation stamp, mail receipt with the date of mailing stamped by the USPS; a dated shipping label, invoice or receipt from a commercial carrier; or any other documentation as proof of receipt of any response.

Contractors are advised that TEA assumes no responsibility, due to any circumstances, for the receipt of a response after the deadline time and date established in this SOW.

11.1 Quantity of Response Copies

- One (1) signed original (clearly marked original) of the complete response and
- One (1) signed copy of the complete response and
- Two (2) Pricing Proposals, Attachment B, bound and submitted separately
- Four (4) flash drives containing copies of the complete response.

Photocopying is not available at TEA. TEA Purchasing and Contracts will not accept additions or replacements to the response after the closing date for receiving the responses.

11.2 Tentative Sequence of Events/Critical Dates

All of these dates except the response due date and the final completion date may vary as conditions require.

Date	Event
August 23, 2013	Distribution of SOW to Contractors
August 23 – 30, 2013	Open period for questions
August 30, 2013, 12:00 p.m. CST	Deadline for questions to TEA
September 5, 2013	Response is due in the Purchasing & Contracts 3:00 p.m., Central Time
September 10 – 11, 2013	Finalist presentations*
September 13, 2013	Best and final offers due
September 16, 2013	Selection of Contractor and commencement of negotiations
September 16–30, 2013	Transition Period (two weeks)
October 1, 2013	Beginning date of contract and commencement of work
August 31, 2014	Ending date of contract and final product submitted to TEA with final billing

*Selected Contractor finalists will be required to be available to present their response with TEA between September 10 – 11, 2013, in Austin, Texas. It is highly recommended that key staff proposed for the project attend the presentation.

11.3 Requests for Additional Information

In order to assure that no prospective Contractor may obtain a competitive advantage because of acquisition of information unknown to other prospective Contractors, TEA will provide any additional information that is different from or in addition to, information provided in the SOW only in response to written inquiries.

The Contractor must make all inquiries for information in writing (email or fax) to the TEA Purchasing and Contracts, Attention: Debra Rosas. The Contractor must identify the SOW number in the written request for information. The email address for inquiries is TEAContracts@tea.state.tx.us and the fax number is (512) 475-1706. Answers to questions will be provided to the DIR Contractors selected to receive this SOW.

11.4 Standard Response Requirements

Texas Education Agency may consider responses that address only part of the requirements contained in this SOW as non-responsive. TEA reserves the right to reject any and all responses and to negotiate portions thereof. TEA may not necessarily fund the selected responses for the full response price if the Agency determines that a different price is more appropriate. The pricing proposal submitted by the Contractor is subject to negotiation by the Texas Education Agency. TEA reserves the right to select the response containing the best offer considering the outcomes desired. The Contractor shall furnish such additional information that the Agency may reasonably require. The Contractor must work with the Agency staff to clarify the design of the materials, project design, project activities, and/or other products, and modify these items if necessary.

11.5 State Not Responsible for Preparation Costs

TEA will not be liable for any costs incurred in the preparation and submittal of a response.

11.6 Disclosure of Offer Content

After contract award, responses are subject to release under the Texas Government Code, Chapter 552, Public Information Act. Contractors must indicate on their response cover if their submission contains proprietary information. TEA recommends that a Contractor identify the specific sections within the response that it considers proprietary.

11.7 Review of Responses

Review of responses will begin as soon as practical after receipt. TEA may ask the Contractors receiving the most favorable ratings during the first round of selection to send a representative to Austin, Texas, at a time and place TEA will arrange, for a presentation of their response. TEA may rate the responses again following presentations. The evaluation team shall consist of TEA staff knowledgeable in the content area.

TEA will notify each Contractor in writing of the selection or non-selection for award. TEA will destroy additional copies of responses not selected for award in accordance with the TEA-approved records retention policy. In the case of a response selected for award, notification to the Contractor will include the contractual conditions that the Contractor must accept in accordance with federal and/or state law.

TEA will select responses based on the ability of each Contractor to carry out all of the requirements contained in this SOW. TEA will base its selection on, among other things, demonstrated competence and qualifications of the Contractor and on the reasonableness of the proposed cost.

TEA will apply the following criteria in assigning the total number of points for each portion of the SOW in selecting a Contractor:

Categories	Possible Points
A. Quality of Management Component <ol style="list-style-type: none"> 1. Evidence of capability and capacity to manage the project (20) 2. Experience of organization (10) 3. Personnel qualifications (10) 4. Knowledge of Migrant Education Program, NGS, and MSIX (10) 	50
B. Quality of Technical Component <ol style="list-style-type: none"> 1. Understanding of NGS roles and responsibilities (20) 2. Approach to meeting the requirements and deliverables, in sufficient detail, to demonstrate understanding of the scope of work (20) 3. Logical and appropriate time frames (10) 	50
C. Cost-Effectiveness and Appropriateness of Financial Resources Dedicated to Project	20
TOTAL	120

TEA determined weights based on the criticality of the particular factor to the selection process. TEA cautions Contractors not to minimize the importance of adequate responses in any area because it carries less weight than other areas. TEA may develop a “short list” of qualified offers, and may determine that the Contractor(s) should submit a Best and Final Offer (BAFO). TEA will give each “short-listed” Contractor a reasonable opportunity for discussion and revision of their offer. After receipt of the BAFO(s), TEA will re-evaluate all Contractors submitting a BAFO based on the Evaluation Criteria.

A preference shall be given as authorized by the Texas Government Code. In addition, according to the Consultant law TGC 2254.021-.040, TEA can give preference to a consultant whose principal place of business is in the state or who will manage the consulting contract wholly from an office in the state [TGC § 2254.021](#). The Agency shall also give preference, among Offers that are otherwise comparable, to an Offer submitted by a HUB.

Suggested Format for Cover Page

PROJECT PROPOSAL

Submitted to

Purchasing & Contracts

For

Texas Education Agency

SOW – RFO #701-14-018

Title of Proposed Project:	New Generation System (NGS) Help Desk
Respondent Organization:	(Name and address of organization submitting response. Include zip code)
Identification Number:	(Respondent organization's Federal Employer's Identification Number or SSN if an individual. If respondent organization is a corporation or if individual is incorporated, the respondent must also enter the charter number of respondent organization or individual.)
Response Developed By:	(Name, position, and telephone number of person responsible for development of response.)
Project Administrator:	(Name, position, and telephone number of person to be in charge of proposed project.)
Response Transmitted By:	(Name, position, and telephone number of official committing the respondent organization to the proposed project.)
Contracting Officer:	(Name, position, and telephone number of official with authority to negotiate contracts for respondent's organization.)
Duration of Project:	October 1, 2013 – August 31, 2014
Total Budget for Proposed Project:	(Total of projected expenditures listed in budget section.)
Contains Proprietary Information:	<input type="checkbox"/> Check here if the material submitted contains proprietary information.
Date Submitted:	(Date Contractor submitted the response to TEA.)

Pricing Proposal
DBITS RFO #701-14-018

Category	Hourly Rate	Task 1	Task 2	Task 3	Task 4	Task 5	Total
Personnel							
Contracted Services							
Supplies & Materials							
Other (Identify)							
Total							

Cost may also be by activity if feasible but must be shown, at a minimum, for task total. Selected Contractor will be reimbursed for actual expenditures upon satisfactory performance of services /completion of tasks and upon submittal of properly prepared and certified invoices/expenditure reports.

Pricing Proposal

DBITS RFO #701-14-018

SUGGESTED FORMAT FOR BUDGET SUMMARY AND EXPENDITURE REPORT

State Fiscal Year/BY	2003
ISAS Contract	No. XXXX
ISAS PO	No. 0000XXXX
Vendor ID	XXXXXXXXXX
Project ID	XXXXXXXXXX
Billing Period	09/01/XX - 11/30/XX
Invoice Number	XXXXXX

The information in this expense summary report is true, correct, and unpaid. A schedule of itemized costs shall be submitted separately upon request of the TEA Contract Administrator.

Signature of Certifying Official (Contractor): _____ Date: _____

I am an employee of the TEA who has knowledge of the satisfactory delivery of services by the contractor, certify that these services were rendered to TEA or goods were received by TEA and that they correspond in every particular with the agreement under which they were procured and that this invoice is true, correct, and unpaid.

Signature of TEA Contract Administrator: _____ Date: _____

Task	Sub-Task	Task Description	Sub-Task/Activities	Est'd Start Date	Est'd End Date	Org'l Budget	TEA Approved Adjustments	Percent Change	Approved Adjusted Budget	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Year to Date	Bud Bal	
01	01.01					-		0.00%	-														-	-
01	01.02					-		0.00%	-														-	-
01	01.03					-		0.00%	-														-	-
02	02.01					-		0.00%	-														-	-
02	02.02					-		0.00%	-														-	-
02	02.03					-		0.00%	-														-	-
03	03.01					-		0.00%	-														-	-
03	03.02					-		0.00%	-														-	-
03	03.03					-		0.00%	-														-	-
04	04.01					-		0.00%	-														-	-
04	04.02					-		0.00%	-														-	-
04	04.03					-		0.00%	-														-	-
05	05.01					-		0.00%	-														-	-
05	05.02					-		0.00%	-														-	-
05	05.03					-		0.00%	-														-	-
06	06.01					-		0.00%	-														-	-
06	06.02					-		0.00%	-														-	-
06	06.03					-		0.00%	-														-	-
07	07.01					-		0.00%	-														-	-
07	07.02					-		0.00%	-														-	-
07	07.03					-		0.00%	-														-	-
TOTAL						-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
01	N/A		Subtotal 01			-	-	0.00%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
02	N/A		Subtotal 02			-	-	0.00%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
03	N/A		Subtotal 03			-	-	0.00%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
04	N/A		Subtotal 04			-	-	0.00%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
05	N/A		Subtotal 05			-	-	0.00%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
06	N/A		Subtotal 06			-	-	0.00%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
07	N/A		Subtotal 07			-	-	0.00%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL						-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CHECK						-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

New Generation System (NGS) Help Desk

SOW: RFO #701-14-018

Access to Confidential Information

SCHEDULE OF TASK COMPLETION

I understand that any unauthorized disclosure of confidential, sensitive, and restricted student information is illegal as provided in the Family Educational Rights and Privacy Act of 1974 (FERPA) and in the implementing of federal regulation found in 34 CFR, Part 99.

I also understand that failure to observe these restrictions is prohibited by the Texas Government Code, Section 552.352 and that such an offense constitutes a Class A misdemeanor.

I certify that I have read and understand the above statement.

Signature

Date

TEA Vendor Guide
Version 4.4

See separate PDF

New Generation System (NGS) Help Desk

Execution of Offer

This form must be filled out in its entirety and signed by an officer or agent empowered to contractually bind the Contractor.

PROPOSER/COMPANY NAME:
STREET ADDRESS:
CITY/STATE/ZIP:
TELEPHONE NO.:
FACSIMILE NO.:
EMAIL ADDRESS:
NAME OF PROPOSER'S AUTHORIZED AGENT:
TITLE OF PROPOSER'S AUTHORIZED AGENT:
SIGNATURE OF AUTHORIZED AGENT:

Appendix C
Statement of Work (SOW)
For Deliverables-Based Information Technology Services (DBITS) Contract
New Generation System (NGS) Help Desk
Texas Education Agency
Addendum #1

Changes to SOW DBITS RFO #701-14-018:

11. Response Submission Requirements

WITHOUT EXCEPTION TEA PURCHASING & CONTRACTS MUST TIME AND DATE STAMP THE RESPONSE BEFORE:

~~September 5~~ **September 20**, 2013 3:00 p.m., Central Time

11.2 Tentative Sequence of Events/Critical Dates

All of these dates except the response due date and the final completion date may vary as conditions require.

Date	Event
August 23, 2013	Distribution of SOW to Contractors
August 23 – 30 September 5 , 2013	Open period for questions
August 30 September 5 , 2013, 12:00 p.m. CST	Deadline for questions to TEA
September 5 20 , 2013	Response is due in the Purchasing & Contracts 3:00 p.m., Central Time
September 10 – 11 September 30, 2013 – October 1, 2013	Finalist presentations*
September 13 October 3 , 2013	Best and final offers due
September 16 October 8 , 2013	Selection of Contractor and commencement of negotiations
September 16 – 30 October 8 - 22 , 2013	Transition Period (two weeks)
October 4 23 , 2013	Beginning date of contract and commencement of work
August 31, 2014	Ending date of contract and final product submitted to TEA with final billing

*Selected Contractor finalists will be required to be available to present their response with TEA between ~~September 10 – 11, 2013~~ **September 30, 2013 – October 1, 2013**, in Austin, Texas. It is highly recommended that key staff proposed for the project attend the presentation.

Appendix C
Statement of Work (SOW)
For Deliverables-Based Information Technology Services (DBITS) Contract
New Generation System (NGS) Help Desk
Texas Education Agency
Addendum #2

Note: TEA has extended the solicitation due date, the time remains the same. Please see the revised dates below:

Changes to SOW DBITS RFO #701-14-018:

11. Response Submission Requirements

WITHOUT EXCEPTION TEA PURCHASING & CONTRACTS MUST TIME AND DATE STAMP THE RESPONSE BEFORE:

~~September 5~~ ~~September 20~~ **September 25**, 2013 3:00 p.m., Central Time

11.2 Tentative Sequence of Events/Critical Dates

All of these dates except the response due date and the final completion date may vary as conditions require.

Date	Event
August 23, 2013	Distribution of SOW to Contractors
August 23 – 30 September 5, 2013	Open period for questions
August 30 September 5, 2013, 12:00 p.m. CST	Deadline for questions to TEA
September 5 20, 2013 September 25, 2013	Response is due in the Purchasing & Contracts 3:00 p.m., Central Time
September 10 – 11 September 30, 2013 – October 1, 2013 October 2 - 4, 2013	Finalist presentations*
September 13 October 3, 2013 October 7, 2013	Best and final offers due
September 16 October 8, 2013	Selection of Contractor and commencement of negotiations
September 16 – 30 October 8 – 22, 2013 October 14 – 25, 2013	Transition Period (two weeks)
October 4 23, 2013 October 28, 2013	Beginning date of contract and commencement of work
August 31, 2014	Ending date of contract and final product submitted to TEA with final billing

*Selected Contractor finalists will be required to be available to present their response with TEA between ~~September 10 – 11, 2013, September 30, 2013 – October 1, 2013,~~ **October 2 – 4, 2013**, in Austin, Texas. It is highly recommended that key staff proposed for the project attend the presentation.

Appendix C
Statement of Work (SOW)
For Deliverables-Based Information Technology Services (DBITS) Contract
New Generation System (NGS) Help Desk
Texas Education Agency
Addendum #2

Questions submitted and received by September 5, 2013:

1. What are the scoring criteria for this RFP/SOW?

TEA Response: Section 11.7 'Review of Responses' outlines the scoring criteria

Categories	Possible Points
A. Quality of Management Component 1. Evidence of capability and capacity to manage the project (20) 2. Experience of organization (10) 3. Personnel qualifications (10) 4. Knowledge of Migrant Education Program, NGS, and MSIX (10)	50
B. Quality of Technical Component 1. Understanding of NGS roles and responsibilities (20) 2. Approach to meeting the requirements and deliverables, in sufficient detail, to demonstrate understanding of the scope of work (20) 3. Logical and appropriate time frames (10)	50
C. Cost-Effectiveness and Appropriateness of Financial Resources Dedicated to Project	20
TOTAL	120

2. Who is currently performing the activities listed in this RFP?

TEA Response: Submit an Open Records Request, pir@tea.state.tx.us, to obtain current Contractor information.

3. Will the current team performing the scope of the activities listed in this RFP (whether TEA personnel or Vendor) provide training to the new Vendor selected for this SOW/RFP?

TEA Response: No, there will not be a training.

4. Does a knowledge base already for the MEP, NGS and MSIX?

TEA Response: If the question is, Does a Vendor have to have knowledge base in the MEP, NGS and MSIX, response is yes.

5. Will TEA provide training to the Vendor on the MEP, NGS and MSIX system, from business, functional and technical perspectives?

TEA Response: TEA will not provide any training but will work closely with the Contractor to ensure their understanding of the MEP, NGS and MSIX requirements.

Appendix C
Statement of Work (SOW)
For Deliverables-Based Information Technology Services (DBITS) Contract
New Generation System (NGS) Help Desk
Texas Education Agency
Addendum #2

6. Do help desk services need to be provided in English only or is Spanish included?

TEA Response: The help desk services need to be provided in English only.

7. The scope (Technical Support, Project Management etc) has references to “creating a call tracking software”. Does TEA require that a tool be created from scratch or can the Vendor suggest a Commercial Off the Shelf product, and customize it?

TEA Response: TEA does not require a tool be created from scratch and will consider suggested products from Vendor.

8. Can the services be performed at the Vendor’s premises?

TEA Response: Yes, the services may be performed at the Vendor’s premises.

9. The RFO/SOW states, “NGS Trainer will train on-site, as requested, Education Service Centers (ESC) and other NGS End-users as specified by designated TEA staff.” Will all the locations required be in Austin? If no, what are the other locations?

TEA Response: No, not all the on-site trainings will be in Austin. Training sites may be geographically throughout the state and sometimes may be outside of the state.