



## Special Education Technical Assistance for Local Education Agencies

### Scope of Work

#### **1.0 Purpose/Background**

##### **1.1 Purpose**

The purpose of this Request for Proposal (RFP) is to solicit proposals from respondents interested in partnering with the Indiana Department of Education (IDOE) to provide targeted and intensive Technical Assistance (TA) to identified Indiana Local Education Agencies (LEAs) for which it is required. Targeted and intensive technical assistance may be necessary regarding the Office of Special Education Programs' [\(OSEP\) Part B indicators of compliance](#), complaint investigations, or noncompliance in general supervision requirements through results-driven accountability. The goal of targeted and intensive technical assistance is to improve educational results and functional outcomes for all children with disabilities while ensuring LEAs meet Part B program requirements.

##### **1.2 Background and Context**

The Indiana Department of Education (IDOE), Office of Special Education (OSE), is responsible for ensuring the general supervision and effective implementation of special education programs throughout the State. Consistent with statutory mandates, the OSE provides technical assistance (TA) designed to improve outcomes for students with disabilities through enhanced educator practice, strengthened local program capacity, and improved compliance with federal and state requirements.

The OSE employs a collaborative technical assistance model that emphasizes partnership with local education agencies (LEAs). The goals of this model include:

- Improving instructional practices and supports for students with disabilities;
- Increasing the capacity of LEAs to implement and sustain high-quality special education programs; and
- Ensuring compliance with federal and state special education requirements, as outlined in [Indiana Administrative Code \(IAC\) Title 511, Article 7](#).

Effective technical assistance integrates coaching, resource development, and ongoing support to build sustainable systems of improvement.

Targeted or intensive technical assistance may be required for LEAs that demonstrate a need for additional support for two or more consecutive years, or as otherwise determined by the IDOE based on monitoring data and performance outcomes. Both targeted and intensive levels

of TA require a strong commitment from LEA leadership and a sustained, collaborative partnership with the assigned TA provider.

States must monitor for compliance with, and enforce the implementation of IDEA by LEAs for children with disabilities. These monitoring activities are referred to as “general supervision”. In accordance with 511 IAC 7, the OSE maintains general supervision over all special education programs within the State. When noncompliance with IDEA or state special education requirements is identified, the OSE must ensure correction as soon as possible, and in all cases, no later than one year from the date of identification.

## **2.0 Respondent Responsibilities/Deliverables**

All deliverables require prior approval from IDOE. All deliverable documentation and resources will be housed in a shared Google Drive, prepared and maintained by IDOE staff. 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. The IOT established and maintains these standards, which support IOT’s data exchange 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/>.

### **Deliverable 1: Targeted Technical Assistance (TA)**

The Respondent shall provide targeted technical assistance to up to twenty (20) Local Education Agencies (LEAs) identified by IDOE. Targeted TA includes responsive, program-specific training, planning, and consultation supports based on common needs across multiple LEAs. These supports are not highly individualized but may include labor-intensive activities such as facilitating Educational Benefit Reviews (EBRs), Theory of Action workshops, and Communities of Practice. Targeted technical assistance can take place virtually or in-person with a preference for at least one in-person meeting, and subsequent meetings taking place virtually.

#### **1. Educational Benefit Reviews (EBRs):**

Educational benefit review is a systematic process used by an LEA to examine a student’s Individual Education Programs (IEPs) across multiple years to determine whether the IEPs were reasonably calculated to provide educational benefit, based on the student’s unique circumstances.

IDOE-developed EBR materials, informed by stakeholder feedback from a pilot process, will be provided to the Respondent. The Respondent shall individualize these materials as appropriate for each participating LEA. EBR will be conducted based on IDOE identified needs.

The respondent is expected to contact each identified LEA within 5 business days of notification. At a minimum, the Respondent must:

- a. Submit LEA-customized EBR resources and presentations to IDOE for review and approval at least ten (10) business days prior to the scheduled LEA support sessions.
  - b. Direct training and facilitation to LEAs to deepen local capacity to develop and implement high-quality IEPs.
2. Theory of Action Workshops:

A Theory of action is a structured hypothesis describing the connection between strategic actions and expected outcomes. Developing a theory of action requires using critical judgment about which strategic actions will lead to what desired results. Theory of action can be used to address the development of a logic model or to support program decisions, resource allocation, communication, and continuous improvement. The respondent will be responsible for the development of theory of action templates, resources, and presentations materials grounded in research and resources from the Institute of Education Sciences (IES). Theory of action workshops will be conducted as needs are identified by IDOE. At minimum, the Respondent must:

  - a. Draft materials must be submitted to IDOE for review and approval within thirty (30) business days of the project kickoff date.
  - b. Facilitate Theory of Action workshops for LEAs identified by IDOE to strengthen local capacity in developing and implementing high-quality IEPs.
  - c. Submit LEA-customized theory of action resources and slides to IDOE for review and approval at least ten (10) business days prior to LEA support sessions.

**Deliverable 2: Intensive Technical Assistance (TA)** The Respondent shall provide intensive technical assistance to up to twenty (20) LEAs identified by IDOE. Intensive TA consists of services that require a stable, ongoing, and negotiated relationship between the TA staff and the recipient LEA. Intensive TA should include a purposeful, planned series of activities designed to reach increased compliance. Intensive TA requires at least one in-person meeting, with subsequent meetings taking place virtually, unless corrective action plans signify the need for additional in-person support to meet desired outcomes.

Intensive TA must result in meaningful changes to policy, program, practice, or operations that enhance LEA capacity to evaluate and/or support students with disabilities in their corporation. Activities should include extensive follow-up and coaching, either onsite or virtually. At minimum, the Respondent must:

1. Utilize IDOE Monitoring and Compliance Guides, root cause analysis processes, corrective action plans, and the theory of action frameworks to guide TA activities.
2. Focus Intensive TA on correction of noncompliance or addressing complaint investigation findings, which could include activities such as;
  - On-site and/or virtual visits;
  - Facilitating the development or revision of special education policies, practices, and/or procedures;
  - Conducting theory of action workshop, root cause analysis, or corrective action plans; and
  - Supporting LEAs implementing corrective action plans.

Intensive TA is highly individualized based on identified LEA needs. Activities are to be tailored and driven by specific goals. TA goals, actions, and accomplishments shall be documented in a TA Plan submitted to IDOE.

### **Deliverable 3: Program Management and Oversight**

The respondent shall provide overall project management, coordination, and reporting throughout the contract term.

1. Meetings
  - a. Bi-weekly Status meetings shall be held as outlined in section 3.0. The Respondent will prepare and distribute meeting agendas and minutes addressing, at a minimum:
    - i. Project schedule and progress updates;
    - ii. Status of ongoing activities and participating LEAs; and
    - iii. Documentation of any missed deadlines by LEAs or the Respondent
2. Data Collection and Recordkeeping:
  - a. Monthly and year-end reports, team meeting agendas, attendance logs, and LEA TA documents shall be stored in a shared Google Drive.
  - b. The respondent shall develop and maintain a system for tracking participation in all TA activities. TA participation activities will be tracked in a spreadsheet, housed in the Shared Google Drive.
3. Reporting Requirements:
  - a. Monthly reporting: The respondent will report updates and the current status of all deliverables monthly. Monthly reports will include, at a minimum:
    - i. Details of TA support to LEAs including dates, attendance, location, travel justification (if needed), agendas, evaluations, and status of TA support;
    - ii. Details of staff preparation for TA support including dates, time allocated, and summary of activity; and
    - iii. Status update summaries for each LEA regarding improved results, such as met TA goals, completion of an educational benefit review, theory of action, root cause analysis, corrective action plan, or correction of noncompliance.
  - b. Year-end summary report: The respondent will compile a report at the end of the contract period that will be shared at the lessons learned meeting. The report will include:
    - i. Deliverable summary that includes accomplishments, value added, and improvement opportunities; and
    - ii. Overall impact for supported LEAs such as increased compliance, correction of noncompliance, improved policies and procedures, updated staff practices, and improved student outcomes
4. Data analysis: Monthly reports will be submitted to IDOE for review no later than twelve (12) business days after the month's end. The summary report must be submitted for IDOE review before the lessons learned meeting.

5. Resource generation: All program data, reports, documents, and other items specifically generated for IDOE in the course of providing services shall be the property of IDOE and shall be provided upon full request within fourteen (14) business days, not limited to the full completion of the project.

### **Independent Verification and Validation Engagement**

If the State decides to add Independent Verification & Validation (IV&V) services as part of this engagement, the contractor will copy the Indiana Department of Administration (IDOA) – Independent Verification & Validation (IV&V) team member(s) on all project related communications (emails, meeting invites, collaboration tools, etc.) and will grant access to all documents and deliverables throughout the term of the contract.

### **IV&V Payment Approval**

If IDOA elects to deploy Independent Verification and Validation (IV&V) services in connection with this engagement, the IV&V Team shall review and assess all Deliverables to determine compliance with the State's requirements as set forth in the Contract and/or applicable Statement(s) of Work. For contracts entered into, renewed, or amended after June 30, 2026, IV&V shall serve as an approving authority, and no payment shall be issued to the Vendor unless and until IV&V has provided such approval.

### **3.0 Project Meetings**

1. **Project Kick-off Meeting:** A kick-off meeting is required for project initiation. The purpose of the kickoff meeting is to introduce key stakeholders, points of contact for the project, address respondent or IDOE questions/concerns, provide an update on the contract status, and discuss next steps for project implementation. The respondent will draft a meeting agenda and provide it to IDOE at least 72 business hours in advance of the meeting. 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) or in-person (must include travel information and number of staff members). Travel expenses associated with any proposed in-person kick-off meetings must be included in the cost proposal/budget. All travel must be in compliance with IDOA travel policies and procedures. The respondent must provide meeting minutes for IDOE's review and approval within 24 business hours of the meeting completion.
2. **Project Status Meetings:** Additionally, project status meetings are critical for monitoring progress on project deliverables and ensuring the project remains on time and on track to completion. The respondent will establish and facilitate bi-weekly project meetings, with the possibility of meeting weekly as the project progresses. The vendor will draft a meeting agenda and provide it to IDOE at least 24 business hours in advance of each meeting. Meetings will 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). The vendor will provide meeting minutes for IDOE's review and approval within 24 business hours of the meeting completion.

- 3. Lessons Learned Meeting:** Finally, the vendor will conduct one lessons learned meeting at the conclusion of the project to help inform future project planning as well as the continued sustainability of the project. The respondent will draft a meeting agenda and provide it to IDOE at least 24 business hours in advance of each meeting. The respondent will provide meeting minutes for IDOE's review and approval within 24 business hours of the meeting completion.

#### **4.0 Timeline for Project**

<b>Task</b>	<b>Deliverable(s)</b>	<b>Estimated Start Date</b>	<b>Estimated Completion Date</b>
Facilitate project kickoff meeting	Meeting agenda, meeting minutes	October 2026	October 2026
Develop Implementation Plan	Documentation of the plan (in Word or Google Doc format), resources and templates	October 2026	November 2026
Facilitate bi-weekly status meetings	Meeting agenda, meeting minutes, documentation of any missed deadlines (Word or Google Doc)	October 2026	September 2027
Data Collection and recordkeeping	Monthly and year-end reports, attendance logs, LEA TA documents (Word, PDF, or Google Doc)	October 2026	November 2027
Reporting	Monthly and year-end reports on details of TA support, staff preparation, improvements, etc. (Word, PDF, or Google Doc format)	October 2026	November 2027
Provide Targeted Technical Assistance (TA)	LEA-customized EBR resources and presentations (Word, Google Doc, PDF, Google Slides, and/or PowerPoint)	October 2026	September 2027
Provide Intensive Technical Assistance (TA)	TA Plan, log of on-site and/or virtual visits, attendance sheets for workshops and other LEA meetings (Word, PDF, or Google Doc)	October 2026	September 2027
Facilitate Lessons Learned meeting	Agenda, meeting minutes	September 2027	September 2027

## **5.0 Staff Qualifications**

Include the name of all individuals proposed by the respondent to perform the duties described in the “Respondent Responsibilities/Deliverables” section, including the qualifications of each and what tasks each individual would be responsible for. Once a respondent is selected, the assigned project personnel, including the Project Lead, cannot be changed or substituted without IDOE’s prior approval. Such approval will not be unreasonably withheld. An organizational chart and current resumes for each individual must be included as attachments to the submitted Proposal.

- a. **Project Lead:** The respondent must designate one individual to serve as the Project Lead for this work. The Project Lead will serve as the primary point of contact for IDOE. The Proposal must identify the Project Lead by name and include descriptions of how the proposed Project Lead meets the qualifications required. The Proposal must describe how the Project Lead will effectively coordinate, manage, and monitor the efforts of assigned staff, including subcontractors, to ensure that all tasks, activities, and functions are completed effectively and on time. The Project Lead must have, at a minimum, four years of recent experience managing a project of comparable size and scope to the services described in this RFP, ideally with a bachelor’s degree or higher.
- b. **Key Personnel:** The proposal must include position titles and descriptions for key personnel of the project. If staff have been identified, the proposal should include their resume. Key personnel should include experienced facilitators, coaches, or trainers of education professionals. Key Personnel will have a Bachelor’s degree or higher, 2+ years of experience, and an understanding of special education legislation (IDEA and Article 7) and best practices for implementation. Key personnel must be able to support LEAs in implementing strategic plans to address program gaps and opportunities.