

STATE OF OHIO
DEPARTMENT OF ADMINISTRATIVE SERVICES
GENERAL SERVICES DIVISION
OFFICE OF PROCUREMENT SERVICES
4200 SURFACE ROAD, COLUMBUS, OH 43228-1395

AMENDMENT FOR CHANGE
AMENDMENT NO. 4

TO: OHIO DEPARTMENT OF EDUCATION
FROM: ROBERT BLAIR, DIRECTOR, DEPARTMENT OF ADMINISTRATIVE SERVICES
SUBJECT: COMPETITIVE SEALED PROPOSAL - K-8 ASSESSMENT SYSTEM AND THE K-12 OHIO TEST OF ENGLISH LANGUAGE ACQUISITION (OTELA) ASSESSMENT SYSTEM

Attached are pages 1 to 10 to this contract. Remove these pages from the existing contract and replace with the attached pages on the effective and/or revision date.

This amendment is issued to change contract analyst and modify fiscal year 2012 pricing.

All other prices, terms and conditions remain unchanged.

Questions regarding this Amendment and/or the Requirements Contract may be directed to:

Therese Gallego, CPPB
therese.gallego@das.state.oh.us

This Amendment, the main Requirements Contract and any additional amendments thereto are available from the DAS Web site at the following address:

<http://www.ohio.gov/procure>

Affected Contractor(s):

11174
American Institutes for Research
1000 Thomas Jefferson Street NW
Washington, DC 20007-3835
tjesulaitis@air.org



STATE OF OHIO
DEPARTMENT OF ADMINISTRATIVE SERVICES
GENERAL SERVICES DIVISION
OFFICE OF PROCUREMENT SERVICES
4200 SURFACE ROAD, COLUMBUS, OH 43228-1395

MANDATORY USE CONTRACT FOR: K-8 ASSESSMENT SYSTEM AND THE K-12 OHIO TEST OF ENGLISH LANGUAGE ACQUISITION (OTELA) ASSESSMENT SYSTEM

CONTRACT NUMBER: CSP906007

EFFECTIVE DATES: 07/01/09 TO 06/30/14

The Department of Administrative Services has accepted Proposals submitted in response to Request for Proposal (RFP) No. CSP906007 that opened on January 22, 2007. The evaluation of the Proposal responses has been completed. The Offeror listed herein has been determined to be the highest ranking Offeror and has been awarded a Contract for the services listed. The respective Proposal response including, Contract Terms & Conditions, any Proposal amendment, special Contract Terms & Conditions, specifications, pricing schedules and any attachments incorporated by reference and accepted by DAS become a part of this Services Contract.

This Requirements Contract is effective beginning and ending on the dates noted above unless, prior to the expiration date, the Contract is renewed, terminated, or cancelled in accordance with the Contract Terms and Conditions.

This Requirements Contract is available to the Ohio Department of Education as applicable.

The agency is eligible to make purchases of the contracted services in any amount and at any time as determined by the agency. The State makes no representation or guarantee that department will purchase the volume of services as advertised in the Request for Proposal.

Questions regarding this and/or the Services Contract may be directed to:

*Therese Gallego, CPPB
therese.gallego@das.state.oh.us

This Requirements Contract and any Amendments thereto are available from the DAS Web site at the following address:

www.ohio.gov/procure

*Indicates change 02/01/12.

MUTUALLY AGREED UPON CLARIFICATIONS AND MODIFICATIONS – K-8 ASSESSMENT SYSTEM AND THE K-12 OHIO TEST OF ENGLISH LANGUAGE ACQUISITION (OTELA) ASSESSMENT SYSTEM. This section gives only a summary of the Project Requirements and responsibilities.

1. The general Terms and Conditions for the Contract are contained in Attachment Three of the RFP for Project. The Contract consists of:
 - a. The original RFP and any addendums.
 - b. The documents and materials incorporated by reference in the RFP.
 - c. The Contactor's Proposals, as amended, clarified, and accepted by the State.
 - d. The documents and materials incorporated by reference in the Offeror's Proposal and subsequent accepted clarifications.
 - e. Any related amendments issued subsequent to Contract award.
2. This Contract award consists of clarifications accepted by the State from the Contractor up to and including the final Contractor technical response dated February 26, 2007 and the Best and Final Offer (BAFO) as confirmed by the Contractor on March 23, 2007.
3. Ohio Ethics Laws and Political Contributions. The Contractor is currently in compliance and shall continue to adhere to the requirements of the Ohio ethics laws, Ohio Revised Code Section §102.04. Further, the Contractor affirms that, as applicable to the Contractor, all personal and business associates are in compliance with Chapter 3517 of the Revised Code regarding limitations on political contributions and shall remain in compliance for the duration of the Contract and with all applicable provisions that extend beyond the expiration of the Contract. Additional Terms and Conditions, according to each of the Participating States, are set forth in the RFP.
4. Should the current Contractor fail to win a future Contract award, said current Contractor will be required to fulfill its obligations while assisting the subsequent Contractor during the "transition out" period. The transition out period will occur 90 – 120 calendar days prior to the expiration of the Contract.
5. The ODE and the Contractor shall notify the DAS, Office of Procurement Services within ten (10) business days in the event of a change in personnel, financial, or contact information.
6. The Contractor shall provide the DAS Office of Procurement updated insurance forms on an annual basis, or as appropriate when changes go into effect.
7. The original title for this Project was *K-8 Assessment System, The K-12 Ohio Test of English Language Acquisition (OTELA) Assessment System and the Optional Supplemental K-5 Assessment System*. There were no Offerors able to provide the services for the optional portion of the Project, so therefore services for those optional aforementioned services are not included as part of this Contract.

* Indicates change 02/01/12.

Deliverable	Description	2009	2010	2011	2012	2013	2014	2015	2016
	PROJECT MANAGEMENT/COORDINATION								
1	Monitoring								
SUBTOTAL		\$0	\$279,623	\$206,879	\$210,339	\$212,838	\$215,798	\$218,839	\$222,013
2	Consultant Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$0	\$0	\$0	\$0	\$46,887	\$0	\$0
3	ODE Contractor Coordination		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$0	\$0	\$0	\$0	\$0	\$8,232	\$8,232
	ASSESSMENT SYSTEM OVERSIGHT								
4	Oversight Committees		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$146,205	\$150,593	\$155,110	\$158,211	\$162,958	\$167,845	\$172,882
	ITEM DEVELOPMENT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
*5	Targeted Item Development		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$68,220	\$56,730	\$111,774	\$73,826	\$76,033	\$78,314	\$80,672
*6	Item Writer Training		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$54,211	\$55,838	\$70,031	\$58,663	\$60,423	\$62,236	\$64,102
*7	Initial Drafts of Items		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$1,251,635	\$1,058,323	\$528,000	\$1,354,423	\$1,395,053	\$1,436,903	\$1,480,018
*8	Fairness/Sensitivity Committee (FSC)		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$177,206	\$179,291	\$48,409	\$191,761	\$197,511	\$203,432	\$209,539
*9	Content Advisory Committees (CAC)		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$510,236	\$455,537	\$486,117	\$552,138	\$568,705	\$585,767	\$603,332
*10	Content Expert Review		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$0	\$0	\$0	\$76,745	\$79,049	\$81,420	\$83,861
*11	Develop and Maintain Item Bank		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$171,231	\$175,594	\$180,864	\$185,301	\$190,858	\$196,577	\$202,465

*Indicates change 02/01/12.

Deliverable	Description	2009	2010	2011	2012	2013	2014	2015	2016
	FORMS DEVELOPMENT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
*12	Develop Field Test Forms		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$989,067	\$1,018,726	\$1,040,605	\$1,202,150	\$1,404,212	\$1,340,109	\$1,380,317
*13	Drafts of Operational Test Forms		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$177,370	\$327,477	\$172,713	\$369,566	\$380,657	\$392,068	\$403,829
*14	First Copies of the Special Versions		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$485,470	\$484,566	\$499,095	\$644,850	\$664,171	\$684,086	\$704,643
15	Ancillary Test Administration Materials		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$397,391	\$388,000	\$399,637	\$407,633	\$419,858	\$432,458	\$445,430
	PRODUCTION		\$0	\$0	\$0	\$0	\$0	\$0	\$0
*16	Operational OAT and OTELA Tests and Special Versions		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$3,994,944	\$3,918,068	\$4,035,619	\$4,470,414	\$4,600,591	\$4,594,271	\$4,884,936
*17	OAT Half-length Practice Test Materials		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$856,983	\$345,042	\$58,863	\$362,502	\$373,377	\$384,578	\$396,115
	DISTRIBUTION/COLLECTION		\$0	\$0	\$0	\$0	\$0	\$0	\$0
*18	Package and Distribute OAT and OTELA		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$2,512,484	\$2,592,175	\$2,669,940	\$2,874,511	\$2,960,745	\$3,049,567	\$3,141,054
*19	Collect all OAT and OTELA Test Materials		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$2,069,760	\$2,132,333	\$2,596,299	\$2,256,981	\$2,324,690	\$2,394,430	\$2,466,261
	SCORING		\$0	\$0	\$0	\$0	\$0	\$0	\$0
20	Quality Assurance, Document and Data Processing, Reconciliation and Security Plan		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$70,016	\$59,859	\$61,656	\$62,889	\$64,775	\$66,718	\$68,721
21	Demonstration of Scanning and Reporting OAT and OTELA		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$2,892	\$2,979	\$3,069	\$3,130	\$3,224	\$3,321	\$3,420

*Indicates change 02/01/12.

Deliverable	Description	2009	2010	2011	2012	2013	2014	2015	2016
*22	Scan and Score the Multiple Choice for OAT and OTELA		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$3,205,633	\$3,303,116	\$3,402,204	\$3,516,163	\$3,621,647	\$3,730,293	\$3,842,202
*23	Rangefinder Meetings		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$1,190,289	\$954,410	\$950,127	\$1,189,881	\$1,225,567	\$1,262,346	\$1,300,224
*24	Recruit and Train Readers for Handscoring and Establish Scoring Sites		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$1,007,007	\$1,036,931	\$1,068,040	\$1,195,164	\$1,151,318	\$1,185,855	\$1,221,432
*25	Handscoring Constructed Response Items for OAT and OTELA		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$10,689,429	\$10,972,718	\$11,193,297	\$14,075,284	\$14,357,976	\$14,646,340	\$14,940,527
*26	Combine Scores from MC and CR Scoring		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$101,716	\$104,767	\$107,908	\$111,430	\$114,770	\$118,212	\$121,759
*27	Score Field Test Items and Deliver Statistical Reports for OAT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$977,572	\$679,119	\$699,484	\$838,322	\$1,016,031	\$889,373	\$916,056
*28	Score Reports and File Labels for the OAT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$2,615,680	\$2,372,888	\$2,444,077	\$2,674,640	\$2,754,877	\$2,837,529	\$2,922,652
29	Score Reports for the OTELA		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$68,847	\$63,182	\$65,076	\$66,378	\$68,367	\$70,422	\$72,535
30	State Score Reports for OAT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$269,380	\$277,462	\$285,788	\$291,502	\$300,247	\$309,254	\$318,533
31	Additional Materials/Reports		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$8,405	\$2,024	\$2,085	\$2,126	\$2,190	\$2,256	\$2,324

*Indicates change 02/01/12.

Deliverable	Description	2009	2010	2011	2012	2013	2014	2015	2016
	RESCORES/ VERIFICATIONS		\$0	\$0	\$0	\$0	\$0	\$0	\$0
*32	Store and Rescore Student Responses		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$294,818	\$297,204	\$306,120	\$918,552	\$946,106	\$974,490	\$1,003,725
	TECHNICAL/PSYCHOMETRIC		\$0	\$0	\$0	\$0	\$0	\$0	\$0
33	Re-establish Performance Standards for OAT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$0	\$273,905	\$0	\$0	\$0	\$0	\$0
*34	Scale Items and Equate Test Forms for OAT and OTELA		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$190,375	\$196,090	\$201,969	\$248,869	\$256,337	\$264,031	\$271,949
*35	Conduct Analysis on the Field Test Items		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$52,949	\$43,130	\$13,735	\$45,312	\$46,671	\$48,073	\$49,515
*36	Final Technical Reports for OAT, OTELA and AA-SWD		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$387,650	\$397,030	\$322,996	\$338,325	\$348,473	\$358,929	\$369,694
37	Conduct and Report Validity Studies for OAT, OTELA and AA-SWD		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$655,521	\$675,188	\$854,706	\$709,353	\$730,632	\$752,552	\$775,128
	PROF. DEV. / PUBLIC ENGAGEMENT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
*38	Purchase and Deliver Diagnostic Support Materials		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$101,193	\$34,853	\$35,717	\$256,706	\$264,330	\$850,394	\$280,213
*39	Guide for Students and Families		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$0	\$0	\$0	\$427,179	\$439,994	\$453,194	\$466,790
*40	Web Site Resource for Educators for OAT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$332,292	\$267,007	\$127,198	\$280,517	\$288,931	\$297,600	\$306,527
*41	Web Site Resource for Students for OAT		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$352,202	\$362,768	\$225,832	\$381,124	\$392,556	\$404,334	\$416,462

*Indicates change 02/01/12.

Deliverable	Description	2009	2010	2011	2012	2013	2014	2015	2016
*42	Web Delivered Support of the Diagnostic Assessment, KRA-L and OTELA		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$24,347	\$25,077	\$25,829	\$73,769	\$75,981	\$78,262	\$80,609
*43	Regional Meetings		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$0	\$0	\$0	\$305,588	\$314,755	\$326,211	\$335,997
44	Software Approval Application		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$663	\$341	\$352	\$359	\$369	\$381	\$392
	ALTERNATE ASSESSMENT (AA-SWD)		\$0	\$0	\$0	\$0	\$0	\$0	\$0
*45	AA-SWD Training & Administration		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$130,328	\$97,691	\$79,958	\$102,633	\$105,711	\$108,884	\$112,151
46	Delivery and Collection of AA-SWD Test Materials		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$463,204	\$477,101	\$491,412	\$501,242	\$516,278	\$531,767	\$547,719
47	Ancillary Test Administration Materials for AA-SWD		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$4,741	\$4,882	\$5,029	\$5,130	\$5,283	\$5,441	\$5,606
*48	AA-SWD Rangefinding Committee		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$49,388	\$50,870	\$0	\$53,444	\$55,047	\$56,698	\$58,400
49	AA-SWD Standard-Setting Committee		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$0	\$51,149	\$0	\$0	\$0	\$0	\$0
50	Collecting the Administered AA-SWD		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$22,543	\$23,219	\$23,915	\$24,393	\$25,125	\$25,879	\$26,655

*Indicates change 02/01/12.

Deliverable	Description	2009	2010	2011	2012	2013	2014	2015	2016
52	Reporting the Results from the AA-SWD		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$122,276	\$125,945	\$129,723	\$132,318	\$136,287	\$140,375	\$144,586
53	Annual Technical Report Plan for AA-SWD		\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
54									
SUBTOTAL		\$0	\$1,209,862	\$455,978	\$487,612	\$304,404	\$0	\$0	\$0

FISCAL YEAR COSTS

2009	
2010	\$40,266,269
2011	\$39,008,760
*2012	\$39,543,567
2013	\$46,514,185
2014	\$47,671,182
2015	\$49,088,600
2016	\$49,969,600
CONTRACT TOTAL ESTIMATED COST	\$312,062,163

* Indicates the replacement of the Contract subtotal pages and repagination beginning with page 3 as a result of the modification in contract pricing for fiscal year 2012, effective 01/25/12.

The Cost Summary for this Contract can be viewed by line item detail at the following hyperlink: [Otella Spreadsheet](#)

CONTRACTOR INDEX

CONTRACTOR AND TERMS:
11174

American Institutes for Research
1000 Thomas Jefferson Street NW
Washington, DC 20007-3835

CONTRACT NO.: CSP906007-1 (06/30/14)

TERMS: Net 30 Days

CONTRACTOR'S CONTACT: Thomas Jesulaitis

Telephone: (202) 342-5031
FAX: (202) 342-5020
e-mail: tjesulaitis@air.org

PAYMENT ADDRESS:

Mail

American Institute for Research
1000 Thomas Jefferson Street NW
Washington, DC 20007

VIA Electronic Funds Transfer

Sun Trust Bank
8330 Boone Blvd., Suite 700
Vienna, VA 22182-2682

SUMMARY OF AMENDMENTS

Amendment Number	Revision Date	Description
4	02/01/12	To amend the contract pricing for fiscal year 2012 and the change contract analyst.
3	02/04/11	To amend the contract between the Ohio Department of Education and the American Institute for Research, K8/OTELA Contract (#CSP0906007), for fiscal years 2011, 2012, & 2013. The cost increases in this amendment are covered by a grant award by the U.S. Department of Education, General Supervision Enhancement Grant award to the 3-state consortium lead by Ohio. Ohio serves as the project director and fiscal agent for the grant. The grant is for the development of a modified test for an additional 2% of the special education students and all the deliverables under this amendment are specifically for that project; to indicate the repagination resulting from the modifications; and to update the hyperlink for the line item Cost Summary and the Summary of Amendments page.
2	04/25/10	To amend the contract between the Ohio Department of Education and the American Institute for Research, K8/OTELA Contract (#CSP0906007), for fiscal year 2010. The cost increases in this amendment are covered by a grant award by the U.S. Department of Education, General Supervision Enhancement Grant award to the 3-state consortium lead by Ohio. Ohio serves as the project director and fiscal agent for the grant. The grant is for the development of a modified test for an additional 2% of the special education students and all the deliverables under this amendment are specifically for that project.
1	11/13/09	To reduce and modify FY 2010 and 2011 requirements by approximately 14 percent (14%), as reached by mutual agreement due to budgetary constraints; replace Cost Summary form documents and create a hyperlink for detailed line items; and indicate repagination resulting from hyperlink creation.