

March 13, 2017



**Memorandum**

To: Mark Johnson  
From: Lou Fabrizio *LMF*  
Subject: Intent to Contract  
Requisition No. iSeries SAS Amendment 6 - EP4887701 / **RQ20290969**  
(Required for Service Contracts Greater Than \$5,000)

Important Information: Approval of this Memorandum of Intent to Contract is required prior to initiating the contract process. It does not constitute a contract, nor does it imply that a contract will be approved. In that regard, please note that no contractor work can begin until a contract has been approved and signed by both parties. Signed contracts will be returned to the listed DPI Contract Contact Person by the DPI Purchasing and Contracts Section.

Instructions: The questions/information in this memorandum must be completed, and the appropriate approvals obtained prior to initiating a Request for Proposal (RFP) or any contract paperwork, including amendments. All appropriate requested questions and information must be answered and completed, or the form will be returned. If approved, the original memorandum will be forwarded to the Purchase and Contracts Section, and a copy will be returned to the division. If not approved, the original memorandum will be returned to the division.

1. Please complete the following information (If you will use competitive bidding, please insert a short name for the RFP or other bid instrument in the place for Contractor Name; for example: RFP for Parking Services, and do not complete the contract amount or contract dates.)

**Contractor Name: eScholar LLC.**

**Contract Amount: \$236,916.00**

**Contract End Date: Amended June 30, 2018 (Previously June 30, 2017)**

**DPI Contract Contact / Telephone Number: Jordan Kincaid: 807-4196**

2. Is this a contract amendment? If so, please explain fully why you are amending it.  
(Note: If the amendment is for a date extension only, do not answer questions #3 through #12) – Yes.

**NCDPI is amending the eScholar UID License and Support contract for FY18 (7/1/2017 – 6/30/2018) to allow time to conduct an RFP competitive bid process, evaluate, and award a new UID contract, and plan a statewide integration/implementation without disrupting K12 education or any PK20 partners.**

3. Why are you initiating a contract? **eScholar, which is titled Amendment No 1 to 40eScholar UID 2013 Agreement, shall continue to provide Maintenance and Support for the NCDPI and DCDEE eScholar Unique ID Student and Staff system.**
4. How does the contract add value to the teaching/learning process? **The current fully integrated and statewide implemented eScholar solution provides a Unique statewide Identifier (UID) for every student and staff that participates in the NC education system or program at any point in time. This is used to conduct analysis of the policies where they were in school. The COTS product ensures a single identifier across multiple disparate systems and agencies.**
5. Is the service unique and not repetitive with agency activity or other contracts? **Yes Please state why this service cannot be performed within the resources of the agency. This service is unique and not repetitive with agency activity or other contracts. The above services cannot be performed within the resources of NCDPI because of the level and scope of technical support resources and expertise needed for the COTS UID system.**
6. What is the impact, if you do not contract for these services? **The continued success of the eScholar Unique Identifier Student and Staff system is dependent upon the continued license, maintenance and support that are only available through the existence of a maintenance agreement. In addition, the UIDs across sectors will be compromised and the ability to join data across agencies will be impacted in both quality and increased effort.**
7. If this contract is being paid with grant money, does the grant require the contracted services? Please describe the grant references to these contracted services, and give a synopsis of the grant. **NA**
8. Will you use competitive bidding (e.g., RFP?) If yes, skip the remaining questions # 9 through # 12. **The original contract was awarded through the competitively bid RFP process.**
9. Are you using an IT Supplemental Staffing Convenience Contract or other type of convenience contract? If yes, please skip question # 10 and complete questions # 11 and # 12. **NA**
10. Do you plan to request sole sourcing for this contract? If yes, please complete and attach the required sole source justification memorandum. Sole sourcing is warranted whenever only one acceptable source can be found; sole sourcing should never be the first consideration. **(Important: The approval of the DPI Section Chief for Purchasing and Contracts, and approval by the Division of**

Purchasing and Contracts or ITS Procurement Services is required for sole sourced contracts.) **This contract was awarded through a competitively bid RFP and the negotiated rates still apply.**

11. Have you contracted with this vendor previously for related services? If yes, please list all contracts with this vendor during the last twelve months.  
**NC10064809.**

12. How did you calculate the cost (e.g., what is the cost per hour and number of hours?) If the cost per hour is above the DPI maximum for that type of service per the New Service Contract Policies, please attach the required written permission granted by the Deputy Superintendent. **NA**

13. Is this contract for information technology services? **Yes.**

14. If this is a personal service contract request, is the vendor/contractor a retiree? **N/A**

\_\_\_\_\_ Yes  No

If answer is yes, is individual a member of:

\_\_\_\_\_ TSERS (Teachers & State Employees Retirement System)

\_\_\_\_\_ Other (Please Explain) \_\_\_\_\_

Requisition No. **RQ20290969**

Budget Code: **0801-532449-180810200836**

Signed: Margaret Wall Date: 3-13-17  
Budget Representative

Requisition No. **RQ20290969**

Approved: Yes  No \_\_\_\_\_

Signed: [Signature] Date: 3/17/17  
Supt./Deputy Supt./Appropriate CFO/CAO/CIO

**For Technology Contracts, Only:**

Approved: Yes  No

Signed:  Date: 3/17/17  
Chief Information Officer