

April 20, 2017

Memorandum

To: Maria Pitre-Martin
Chief Academic and Digital Learning Officer

From: Tammy Howard, Director
Division of Accountability Services

Subject: Intent to Contract with L. L. Thurstone Psychometric Laboratory
University of North Carolina at Chapel Hill



We request approval to issue a request to solicit a sole-source proposal to provide psychometric guidance and services from the L. L. Thurstone Psychometric Laboratory at the University of North Carolina at Chapel Hill. The contract will provide continuing Psychometric services including technical guidance and support for the development and implementation of North Carolina state assessments.

It is critical that these services be provided and these tasks be performed to ensure the technical quality and soundness as well as legal defensibility of the tests. The L. L. Thurstone Psychometric Laboratory at UNC-CH has been providing this service for the North Carolina Testing Program since the initial development and implementation of the first edition of the North Carolina Competency Tests in the late 1970s. It is expected that all services provided and all tasks performed under the terms and conditions of this contract are to be completed by June 30, 2018.

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: University of North Carolina at Chapel Hill
Contract Amount: \$76,539.00
Contract Dates: July 1, 2017 to June 30, 2018
DPI Contract Contact Person and Telephone Number:
Tammy Howard (919) 807-3787.

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)

No. This is not a contract amendment but an RFP is being issued to solicit the L.L. Thurstone Psychometric Laboratory, University of North Carolina at Chapel Hill, to submit a proposal to provide psychometric services to the department during the development of state tests.

3. Why are you initiating a contract? What services will you require?

We are requesting permission to submit a RFP to solicit psychometric services to provide technical and psychometric guidance and support to the North Carolina Testing Program.

4. How does the contract add value to the teaching/learning process?

The contract adds value to the teaching and learning process indirectly by ensuring that the assessment instruments used to gauge the level of student performance are valid and reliable instruments that are also otherwise technically sound and appropriate measures of North Carolina students.

5. Is the service unique and not repetitive with agency activity or other contracts? Please state why this service cannot be performed within the resources of the agency.

This service is unique and not repetitive within the agency activities or other contracts. These services cannot be performed within the resources of the agency as the agency does not have sufficient psychometric experts who can perform these tasks in the allotted timelines. In addition, the L. L. Thurstone Psychometric Laboratory provides a system of checks and balances that assures the technical quality and soundness of the state assessment system.

6. What is the impact, if you do not contract for these services?

If we do not contract for these services, the impact will be that there will be no external validation of the technical quality and soundness of the North Carolina tests.

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.

Testing is required under both state & federal statutes. Accordingly, the funds to pay for this service must be allocated from state and/or federal sources, but will be funded mostly out of federal funds under the State Assessment Grant.

8. Will you use competitive bidding (e.g., RFP?) If yes, skip the remaining questions # 9 through # 12.

It is not expected that the competitive bidding process will be used for this contract as this is a task-order contract with UNC-CH for Psychometric Services. No other university in the state can provide the level of technical services provided by the L. L. Thurstone Psychometric Laboratory.

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.

This is not an IT Supplemental Staffing Convenience Contract or other type of convenience contract.

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.)

We plan to provide a RFP to UNC-CH asking them to submit a proposal in response to the department's statement of scope of work required. This invitation is only being extended to the UNC-CH. We are seeking to initiate a contract with the L. L. Thurstone Psychometric Laboratory at the university without the use of the competitive bidding process by using the task order process.

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.

We have contracted with this vendor previously for many years to provide the type of services being requested. The previous contract was for psychometric and technical services from July 1, 2015 to June 30, 2016, NC10224398.

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.

The estimated cost for this service is being proposed by comparing similar services provided in the past.

13. Is this contract for information technology services?

This contract is not for information technology services.

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

_____ Yes No

If answer is yes, is individual a member of:

_____ TSERS (Teachers & State Employees Retirement System)

_____ Other (Please Explain)

Requisition No. **RQ20390588**

Budget Code: 0801-532150-160037950315

Signed: Margaret Wall Date: 5/2/2017
Budget Representative

Requisition No. **RQ20390588**

Approved: Yes No

Signed: MPitce-Martin Date: 4-25-17
Supt./Deputy Supt./Appropriate CFO/CAO/CIO

For Technology Contracts, Only:

Approved: Yes No

Signed: _____ Date: _____
Chief Information Officer