

Memorandum of Planned Contract

INSTRUCTIONS

DELETE THIS PAGE PRIOR TO EXECUTION AND SUBMISSION

- A Memorandum of Planned Contract (formerly known as an Intent to Contract) is required for good/service contracts greater than \$25,000. The information contained in this form is not made public at the monthly DPI State Board of Education (SBE) meeting.
 - Non-IT Good and Service purchases over \$25,000 – Planned contract form required
 - IT Good and Service purchases over \$25,000 – Planned contract form required

***Note: All IT Good and Service purchases at any dollar amount that are not on a State Term Contract require the IT Approval to Purchase form**

- **IT Good and Service purchases on State Term Contracts** over \$25,000.00 - IT Approval to Purchase form required; **Planned Contract form Not Required**
- Provide answers on the template on the following page(s) and upload a completed version in the requisition in E-procurement. Each section shall be completed including the requisition number that is assigned when the request is entered into eprocurement.
- The information provided should reflect the understanding of the business needs and provide information to help DPI Procurement evaluate and appropriately structure a potential procurement process.
- DPI Procurement will review the Memorandum of Planned Contract while reviewing the requisition in the E-procurement workflow, if there are any questions or additional information required, DPI procurement will contact the Requestor/Business Owner.
- Do not change the font, headers or borders on the PC as this document has to go to the SBE for approval and needs to remain in this font style and size.

IMPORTANT INFORMATION

- **DPI Business Owners/Directors/Requestors are not authorized to sign/execute contracts of any type (i.e., Task Orders, RFPs, IFBs, RFQs, MOUs, MOAs, DPI Contracts, Vendor Contracts, Building/Hotel/Room rentals, etc.) on behalf of the NC Department of Public Instruction at any dollar amount. The only authorized signers are the CFO and Superintendent.**
- This document is a first and necessary step in the contracting process, but it does not constitute a contract, nor does it imply that a potential contract resulting from this document will be approved.
- **NO contractor work can begin until a contract has been approved and signed by both parties.** Signed contracts are obtained by DPI Procurement and will be returned to the Requestor/Business Owner/Vendor/Contractor upon contract execution.

Date: July 18, 2024

Memorandum of Planned Contract

COMPLETE ALL ITEMS BELOW BEFORE SUBMISSION

To:	Superintendent
From:	Sandy Wheat
Name, email, and phone number of the DPI Business Owner	Lori Carlin 919-819-2959 lori.carlin@dpi.nc.gov
DPI Business Owner/ Director/Designee Signature & DPI Division:	 Kristi Day
Title of Request:	Transfer of EPF Training Funds
Recommended Vendor Contact Information <small>(Name, email address and telephone; if this contract is a RFP or IFB, enter N/A)</small>	Sandy Wheat NCCEE O: 919.791.1995 C: 919.413.3974
Eprocurement Requisition #: <small>(RQ#####) (PR#####)</small>	RQ89726
Funding Source: <small>(Determining Budget Source in eprocurement line item detail: State – 1; Special Fund – 2; Federal – 3; Carryforward – 4; State - General Fund – 1000; Receipt Based - 7</small>	General Fund
Contract Type: <small>(New Contract, DPI Contract, Task Order, Amendment, RFQ, RFP, IFB)</small>	New Contract
Contract Amount: <small>(include original and amendment amounts)</small>	\$450,000 annually/\$900,000 for the two year period
Contract Term: <small>(Enter future contract date, i.e., upon contract award through MM/DD/YYYY); for Goods enter (One-Time Buy) no contract term is required unless there is an actual contract term for delivery of the good(s).</small>	UPON CONTRACT AWARD/EXECUTION 2024-2025; 2025-2026
Required for Good/Service Contracts, greater than \$25,000	
Important Information: A requisition shall be entered for all requests. The Memorandum of Planned Contract will be approved electronically in the Eprocurement approval flow after SBE approval (contracts that exceed \$500,000.00) and a contract is fully executed by the CFO or Superintendent (as applicable). This memorandum does not constitute a contract or imply that a contract will be approved. <u>Please note that no contractor work shall begin until a contract has been approved and signed by both parties.</u> Executed contracts will be returned to the Requestor/Business Owner/Vendor/Contractor by DPI Procurement.	

QUESTIONS BEGIN ON THE FOLLOWING PAGE

1. Contracts over \$500,000 require State Board approval. Will this contract require Board approval?
NO
2. Is this contract required by Statute? If so, please provide the information.
YES
3. Is this contract required by State Board policy? If so, please provide the information.
NO
4. Is this contract a grant requirement? If so, please provide the information.
NO
5. If this contract is for Information Technology Goods/Services, have you attached an approved/executed IT approval to purchase form to the requisition to initiate this contact (*A Planned Contract memo is not required for IT goods/services purchased through a NC state term contract*)?
NO
6. For DIT related contracts, will this contract require a Purchasing or Hosting Exception?
NO
7. If this is a new contract, please provide a detailed Scope of Work. This should include major activities, milestones, dates, deliverables, etc. It should represent your best guess at this point in the process, and it is understood this may change during the procurement process. You may attach an additional sheet if necessary. *Please do not enter See attached unless you have the scope of work attached to this form or in the requisition.*
See attached

Is the scope of work attached to this form or uploaded into the requisition in eprocurement?

YES

The NC Department of Public Instruction (NCDPI) seeks to contract with a Vendor to provide Economics and Personal Finance (EPF) training as mandated by statute, NC Gen Stat § 115C-81-65. The State of North Carolina has provided funding to NCDPI with recurring funds. All professional development will provide teachers with training on content and pedagogy designed to strengthen their ability to teach the EPF course effectively with up-to-date information and resources.

The EPF Institutes consist of forty (40) hours of professional development for teachers of the EPF Course.

To implement responsibilities, per G.S. § 115C-81.65, the Vendor shall provide the following services:

1. Present seven (7) Economics and Personal Finance Institutes (EPF Institutes), for up to 350 teachers during the calendar years,
2. Conduct four (4) virtual sessions and three (3) in-person sessions,
3. Instruct eight (8) deeper dive content single-day sessions throughout the academic year as well as eight (8) webinars.
4. Provide \$500 stipends for teachers attending on their own time,
5. Reimburse substitute teacher pay for teachers attending during school days up to \$500,
6. Administer the Test of Economics Literacy and the Working in Support of Education (WISE) Financial Literacy Certification test pre-and post-tests for all attendees,
7. Provide a comprehensive report to NCDPI including the following:
 - Number of teachers completing the EPF Institute
 - Promote financial equity by detailing the percentage of teachers who serve Title I schools
 - Number of stipends awarded
 - Hours of Professional Development completed by NC teachers
 - Number of teachers attending the EPF for the first time
 - Number of students to benefit each year from better prepared teachers
 - Confidence level and proficiency of educators teaching economics and personal finance detailing
 - o Percentage of teachers unprepared to teach EPF prior
 - o Percentage of teachers passed the Test of Economic Literacy
 - o Percentage of teachers who felt confident to teach EPF after
 - o Percentage of teachers who obtained WISE Financial Literacy Certification
 - Percentage of educator's who plan to invest more for retirement or are already well invested
 - Percentage of educators who plan to pay down unsecured debt or do not have unsecured debt
8. Provide breakfast and lunch for in-person attendees,
9. Covers lodging for attendees traveling more than sixty (60) miles each way-scholarship based,
10. Provide teachers with a certificate of attendance which may be submitted for Continuing Education Units (CEUs),
11. Provide teachers with a Financial Literacy Certification.

8. **If this is a contract amendment**, briefly describe the service you need and the business case for it (e.g., why it is necessary and how it will help you carry out the work of your division).

N/A