

PDF Copy

Low Achieving Schools Turnaround Partners

Proposal in response to RFP # DOE-LAST-2013-04

Commonwealth of Virginia
Department of Education
August 2013

**Proposal in response to RFP# DOE-LASTP-2013-04
Low Achieving Schools Turnaround Partners**

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**COMMONWEALTH OF VIRGINIA
DEPARTMENT OF EDUCATION
REQUEST FOR PROPOSAL (RFP)**

Issue Date: June 14, 2013 RFP# DOE-LASTP-2013-04

Title: Low Achieving Schools Turnaround Partners

Commodity Code: 92471 - School Operation and Management Services

Issuing Agency: Commonwealth of Virginia
Department of Education
101 North 14th Street, 21st Floor
Richmond, Virginia 23219

Using Entity And Location: Virginia Public School Divisions and Other State or Local Public Educational Bodies Requiring Such Services

Initial Period of Contract: October 1, 2013 - September 30, 2016 (Renewable)

Sealed proposals will be received in the Procurement Office until 2 p.m., August 15, 2013 for furnishing the services as described herein. No proposal shall be accepted after this deadline unless the due date has been previously changed by an Addendum.

All inquiries, questions, and requests for information should be directed via e-mail to ann.sells@doe.virginia.gov or by phone at 804-225-2067.

PROPOSALS MUST BE DELIVERED TO THE JAMES MONROE BUILDING, 101 N. 14TH STREET, RICHMOND, VA, 23219, 21ST FLOOR, PROCUREMENT OFFICE, TO THE ATTENTION OF ANN SELLS (See Section IX, 3. Identification of Proposal Envelope.) This is NOT a mailing address. It is recommended that proposals be hand delivered.

In compliance with this Request For Proposals (RFP) and all conditions imposed in this RFP, the undersigned firm hereby offers and agrees to furnish all goods and services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation, and the undersigned firm hereby certifies that all information provided below and in any schedule attached hereto is true, correct, and complete.

Name and Address of Firm:

Community Training and Assistance Center
30 Winter Street, 7th Floor
Boston, MA

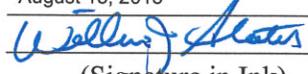
Zip Code: 02108

eVA Vendor ID or DUNS #: 130848047

Fax Number: () 617-423-4748

E-mail Address: ctac@ctacusa.com

Date: August 13, 2013

By: 
(Signature in Ink)

Name: William J. Slotnik
(Please Print)

Title: Executive Director

Telephone Number: () 617-423-1444

PREPROPOSAL CONFERENCE: An optional pre-proposal conference will be held on, July 09, 2013, at 10:00 a.m. in the Jefferson B Conference Room on the 22nd floor of the Monroe Building, 101 North 14th Street, Richmond, Virginia 23219. (Reference: Section VII herein.) If special ADA accommodations are needed, please contact Ann Sells via email: ann.sells@doe.virginia.gov or by telephone at 804-225-2067.

Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.



COMMONWEALTH of VIRGINIA

DEPARTMENT OF EDUCATION

P.O. BOX 2120
RICHMOND, VA 23218-2120

July 10, 2013

ADDENDUM NO.1 TO ALL OFFERORS

Reference – Request for Proposal: RFP #DOE-LASTP-2013-04
 Commodity Code: 92471 – Low Achieving Schools Turnaround Partners
 Dated: June 14, 2013
 For Delivery To: Department of Education
 Offer Due: Until 2:00 PM, August 15, 2013
 Pre-proposal Conference: 10:00 a.m., July 09, 2013

The above is hereby changed to read:

1. Reference page 8 and 9, RFP Section IV. B. 5, 7 and 8 - Specific Proposal Instructions: Add as last sentence to first paragraph for each of the referenced sections:

Include in the original proposal only (do not include in proposal copies).

2. Reference Page 8, RFP Section IV. B.5 – Specific Proposal Instructions: Add as last sentence to last paragraph for the referenced section:

Include in the original proposal only (do not include in proposal copies).

Note: A signed acknowledgment of this addendum and attachment must be received at the location indicated on the RFP either prior to the proposal due date and hour or attached to your proposal. Signature on this addendum does not substitute for your signature on the original RFP document. The original RFP document must be signed.

Sincerely,

Ann Sells, CPFB, VCO
Associate Director of Procurement
804-225-2067

Community Training and Assistance Center

Name of Firm

Signature /Title William J. Slotnik, Executive Director

8/13/13
Date



COMMONWEALTH of VIRGINIA

DEPARTMENT OF EDUCATION

P.O. BOX 2120
RICHMOND, VA 23218-2120

August 12, 2013

ADDENDUM NO. 2 TO ALL OFFERORS

Reference – Request for Proposal: RFP #DOE-LASTP-2013-04
Commodity Code: 92471 – Low Achieving Schools Turnaround Partners
Dated: June 14, 2013
For Delivery To: Department of Education
Offer Due: Until 2:00 PM, August 15, 2013
Pre-proposal Conference: 10:00 a.m., July 09, 2013

The above is hereby changed to read:

1. Reference RFP Table of Contents (page 2) XII, Attachments - Attachment D –“Small Business Participation Form” is hereby deleted from the Table of Contents.
2. Reference RFP Section IV, B, 7, Specific Proposal Instructions (page 8 and 9). - Paragraph #7 is deleted in its entirety.
3. Reference RFP Section V. A. Evaluation Criteria (page 9) – Delete item #7 Criteria “Small Business Subcontracting Plan” from both tables, “LTP Excluding Mangement” Option and “LTP Full Management” Option.
4. Reference RFP Section VI D, Reporting and Delivery Instructions (page 11) – Paragraph D, “Small Business Subcontracting Plan,” is deleted in its entirety.
5. Reference RFP Section IX, Special Terms and Conditions, paragraph #7 (page 20) – Paragraph #7, “Small Business Subcontracting And Evidence of Compliance” is deleted in its entirety.
6. Reference RFP Attachment D, Small Business Subcontracting Plan (page 28) – Delete Attachment D, “Small Business Subcontracting Plan,” in its entirety.
7. Reference RFP Section IX, Special Terms and Conditions (page 18) – Add the following Special Terms and Conditions as #12 and #13:

12. **OWNERSHIP OF INTELLECTUAL PROPERTY:** All copyright and patent rights to all papers, reports, forms, materials, creations, or inventions created or developed in the performance of this contract ("the Intellectual Property"); shall become the sole property of the Virginia Department of Education. The contractor hereby assigns to the Commonwealth exclusively all right, title, and interest in and to all rights in the Intellectual Property that the contractor may have or obtain, without further consideration, free from any claim, lien for balance due, or rights of retention thereto on the part of the contractor. The parties do not intend for and the contractor shall not be deemed to be a joint author or inventor of the Intellectual Property. Upon request, the contractor shall promptly provide any further acknowledgment or assignment in a tangible form satisfactory to the Virginia Department of Education to evidence the Virginia Department of Education's sole ownership of the Intellectual Property.
13. **SUBCONTRACTS:** No portion of the work shall be subcontracted without prior written consent of the Virginia Department of Education. In the event that the contractor subcontracts any part of the work specified herein, the contractor shall include the "OWNERSHIP OF INTELLECTUAL PROPERTY" language above in the contract(s) with the subcontractor(s), shall remain fully liable and responsible for the work to be done by its subcontractor(s), and shall assure compliance with all requirements of the contract.

Note: A signed acknowledgment of this addendum and attachment must be received at the location indicated on the RFP either prior to the proposal due date and hour or attached to your proposal. Signature on this addendum does not substitute for your signature on the original RFP document. The original RFP document must be signed.

Sincerely,



Ann Sells, CPPB, VCO
Associate Director of Procurement
804-225-2067

Community Training and Assistance Center
Name of Firm


Signature /Title

August 13, 2013
Date

ATTACHMENT A

LTP Option(s) and School Level(s) Covered by Offeror’s Proposal

Offeror’s Proposal must include at least one or more of the following option/school level combinations:

1. “LTP Excluding Management” Option for Elementary Schools
2. “LTP Excluding Management” Option for Middle Schools
3. “LTP Excluding Management” Option for High Schools
4. “LTP Full Management” Option for Elementary Schools
5. “LTP Full Management” Option for Middle Schools
6. “LTP Full Management” Option for High Schools

Offeror must indicate the option/school level combination(s) addressed by the offeror’s proposal by entering “x” in the appropriate cells in the table below.

Offeror Name: Community Training and Assistance Center

	Elementary School – high grade 5	Middle School – high grade 8	High School – high grade 12
“LTP Excluding Management” Option	X	X	X
“LTP Full Management” Option			

IV.B.3. Summary Statement

IV.B.3.a. Experience in providing the same or similar services contemplated herein.

The Virginia Department of Education seeks assistance from qualified sources to serve as Low Achieving Schools Turnaround Partners (LTPs) on an as-needed, when-needed basis to develop and implement an academic program for one or more of the core discipline areas of mathematics, science, history/social science and language arts for students in persistently low achieving Virginia public schools. The Community Training and Assistance Center (CTAC) is prepared to provide that assistance to schools by using strategies developed over the course of more than 30 years working with multiple districts and states to increase student achievement—especially in the lowest-performing schools—by linking on-site practice with research and policy for sustainable results. Key in our approach is working with school teams to systematically analyze why the school persistently underperforms. The teams go beyond identifying symptoms, instead probing deeply into data to determine the root causes of underperformance. Strategies for action can then target the real issues that need to be remedied and do so with lasting results.

The methodology that CTAC has developed for this work is our research-based Standard Bearer Schools (SBS) process, described in detail in Section IV.B.4. SBS supports school reform efforts that result in greater academic achievement, strong school leadership, well-developed school-community relationships, and a culture of collaboration and continuous improvement in Virginia's 36 identified priority schools.

The CTAC vision of school support is one of collaboration, coaching, guidance and collegial cooperation. The local context and current operational baseline for each school is different and in many ways unique. Therefore, it is essential that change in current methods of doing business be locally owned and supported. Solutions generated by local teams not only lead to improvements but at the same time build internal school capacity to integrate those improvements into the fabric of the organization. The positive changes last long after the external supports are gone. It is CTAC's view that temporary, short lived success is worse than the status quo as it builds hope but ends in unfulfilled expectations. With this perspective CTAC staff work tirelessly to provide technical assistance through a lens of creating systemic, sustained outcomes for staff and students in the school community.

Through CTAC's Standard Bearer Schools process and technical assistance approach, the strategies for student achievement percolate from within the school based on data-informed decisions. For this to occur, the general school culture must be one of trust, with an open and honest atmosphere and school staff ready, willing and able to address roadblocks impeding better outcomes for students. CTAC's approach is consistent with the High-Performing High Poverty Schools model presented in *The Turnaround Challenge*. Teachers, administrators, staff, families and community members all come together, ready to learn, ready to act, and ready to teach.

CTAC has extensive experience developing leadership, planning, and managerial capacities in schools and divisions. In response to the need for coordinated division and school improvement planning, CTAC pioneered and implemented the SBS process which has significantly improved student achievement and sustained turnarounds in urban school systems, including Lowell (MA), Christina (DE), Albuquerque (NM), Decatur (IL), and Cleveland (OH). The following provides specifics of these experiences along with a description of our work with the Northeast Comprehensive Center on turnaround schools:

IV.B.3.a. Continued (Experience providing similar services.)

Lowell Public Schools, MA.

After its first year of working with the SBS process (2010-11), the Murkland School (one of the 34 lowest performing schools in Massachusetts) essentially reached in year one its exit criteria goal for English language arts and Mathematics set for the third year of the school turnaround plan. Also, in the first year of the SBS process, the school outperformed the state in all student growth categories at the 4th grade level. Student success has been sustained at Murkland over the 2 subsequent years. Six additional schools are now engaged in the SBS process directly, and district support to all leaders and schools is being organized around attention to root causes.

Christina School District, DE.

Over two years in Christina, the state's largest district (20,000 students), student achievement rose for all student groups on three independent assessments (Delaware Student Testing Program, Stanford Achievement Test 9/10, and Measures of Academic Progress), and the achievement gap narrowed. More than that, African American and Hispanic students had the most significant achievement increases—for the first time ever in this district. These results demonstrate that it is possible to raise the achievement levels of all student groups while concurrently reducing the achievement gap.

Albuquerque Public Schools, NM.

In New Mexico's largest district (94,000 students), academic achievement improved over a three-year period at more than 70% of the district's elementary schools and at all the middle schools. The district also achieved the highest ACT scores at the high school level of any large district in the United States. Significant improvements resulted in increased academic achievement, attendance and family involvement at the schools, lower dropout rates and a higher rate of early identification of problems, and parents became equal partners with the leadership and union in managing system-wide reform.

Decatur Public Schools, IL.

The Decatur School District 61 in Decatur, Illinois used CTAC's assessment of readiness and capacity as a catalyst for major systemic reform. The district strengthened organizational capacities based on the assessment. The resulting reform initiative improved standards alignment and academic rigor, with a demonstrable effect on student achievement. Following the assessment of readiness and capacity, CTAC implemented the Standard Bearer Schools process, providing data analysis, technical assistance and training to elementary and middle schools in "needs improvement" status. Students made significant gains in mathematics, an area that was targeted for substantial student need.

Cleveland Metropolitan School District, OH.

In one of the earliest examples of turnaround work—during the nation's earliest days of state academic intervention—CTAC provided assistance to the public schools in Cleveland, Ohio. This was the first site-based, school reform initiative in Cleveland that showed sustained performance improvements. Schools participating in CTAC's Standard Bearer Schools process outperformed the rest of the district in three out of four state testing areas and had student suspension rates more than 100% lower than the rest of the district. CTAC assisted the district to implement the groundbreaking Principals' Performance Support System that linked principal evaluation to student success. We also guided the reorganization of the central administration.

Northeast Comprehensive Center.

CTAC is a partner with the RMC Research Corporation, Learning Innovations at WestEd, and the New York Institute of Technology in providing technical assistance, information, and resources to state education agencies in Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, and Vermont. CTAC Senior Managers and Senior Associates serve in a number of capacities

IV.B.3.a. Continued (Experience providing similar services.)

including Lee J. Rutledge, Program Specialist, who serves as the liaison to the National Center on School Turnaround, linking states with the latest research on school turnaround and implementation. CTAC provides support in the implementation of Student Learning Objectives (SLOs) for purposes of teacher and principal evaluation, development of state educator effectiveness standards and evaluation models, and alignment of state resources to support district and school turnaround efforts.

The Murkland Story: From Struggling School to Turnaround Model

CTAC guided the leadership team at Lowell, Massachusetts' Charlotte M. Murkland Elementary School through the SBS process, including a review of survey results and student test scores to find the source of low test scores. The SBS process was expanded to the whole school through grade level team meetings where data and classroom practices were reviewed. Staff members who led the reform effort helped all stakeholders focus on those issues they could control, following an often repeated phrase, "look in the mirror, not out the window". This scrutiny led to a realization that the instructional strategies in place were not reaching the students. Classrooms were quiet and well disciplined but students were passive learners. Teachers began to focus on what they could do to teach the children in a more strategic manner, sharing experiences and reviewing best practices.

The resulting plan called for concentrating effort to address the needs of every student, not to single any group out, but to offer supplemental help to any student with demonstrated need. Instruction shifted as teachers emphasized aligning lessons to the curriculum and incorporating higher quality questioning techniques. Students were given more responsibility for their own learning and for asking for help when it was needed. Today, observers report that classrooms are more energized, with students actively questioning and interacting with each other to investigate questions and to discover answers that are personally meaningful.

Teachers' expectations for student performance increased. Even those teachers who were initially skeptical have now seen the progress and want to be sure they and their students are not left behind. One CTAC colleague reports there is a pervasive sense that "our kids can do it - we just have to find the right way to teach them."

The results at Murkland have been impressive. In a school where more than half of the students each grade level are English Language Learners, a 13 percent increase was seen in the percent proficient on the English Language Arts assessment and a 20 percent increase in mathematics. And, that was one year's worth of progress. Growth scores in both subjects exceeded that of peer schools statewide, particularly in math where students' growth percentile scores were at the 80th percentile, leading many to refer to the outcome as the "Murkland Miracle".

Upon review of the results, the Massachusetts Secretary of Education, Paul Reville, said, "I applaud the hard work of our students, teachers and administrators and, in particular, the accomplishments of the Murkland Elementary School." And, Randi Weingarten, President of the American Teachers Federation (AFT), said: "Part of what I wanted to do is just see it, but also just say thank you and take my pen out and start writing how you've done it. It's really *breathtaking*." And perhaps even more impressive and heartening, the results have been sustained over the subsequent years.

Additional District and School-Level Work:

In tandem with the SBS process in Virginia, CTAC will introduce the use of Student Learning Objectives (SLOs), a research-based instructional strategy designed to strengthen teacher practice and improve student learning. CTAC's work in Denver and Charlotte-Mecklenburg, described below, illustrates the successful implementation of the SLO approach in school reform.

Denver Public Schools, CO.

CTAC provided five years of assistance to the Denver Public Schools as the district implemented its landmark performance-based compensation initiative for teachers. CTAC provided the technical assistance to ensure a pilot of quality and integrity and also evaluated the impact of the initiative. Our evaluative findings show that students whose teachers had excellent SLOs have increases in student achievement (greater than one year's gain) at all three academic levels during all four years under study. These results are demonstrated on two independent measures of student achievement – the CSAP and the Iowa Test of Basic Skills.

IV.B.3.a. Continued (Experience providing similar services.)

Our Denver evaluation reports, *Pathway to Results* and *Catalyst for Change*, are the first comprehensive studies on the impact of performance-based systems on student achievement, teacher effectiveness, and systems change. Our findings contributed to the approval of a new teacher compensation system (ProComp) by Denver teachers by a 3 to 2 margin and the approval of a \$25 million tax increase by Denver voters, also by a 3 to 2 margin, to support the costs of the new compensation system.

Charlotte-Mecklenburg Schools, NC.

CTAC provided five years of technical assistance to the Charlotte-Mecklenburg Schools (CMS) as CMS implemented the Leadership for Educators' Advanced Performance (LEAP) initiative. As in Denver, CMS teachers use the CTAC-developed SLO process and are recognized and rewarded based on their students' achieving their learning goals. CMS won the Broad Prize in 2011 for being the urban school district in America that has demonstrated the greatest overall performance and improvement in student achievement while reducing achievement gaps.

CTAC recently released the study, *It's More Than Money*, a longitudinal study of the effect SLOs have on student learning. CTAC analyzed 4,000 teacher-developed SLOs as part of this performance-based system initiative implemented from 2007-2012. Overall, CTAC's study finds significant multi-year differences in growth rates between students whose teachers had SLOs and students of comparison school teachers without SLOs. In Mathematics, the growth rate is 12% greater and, in Reading, the growth rate is 13% greater. These marked achievements in student academic growth took place despite the disruptions of recession-prompted budget cutting as well as turnover in school and district leadership. While SLOs serve as an excellent measure of teacher practice, they are also an instructional reform, as the thinking process engaged in by teachers and leaders leads to improved practice.

IV.B.3.b. Verifiable data (names of schools, addresses, dates, etc.) that demonstrates the offeror's past effectiveness in increasing student academic achievement.

1. U. S. Department of Education (Dates of service: September 2010—present)
CTAC provides technical assistance to the Race to the Top States and to USED on educator evaluation systems, including measuring student growth in non-tested grades and subjects, and Student Learning Objectives.
 - a. Brad Jupp, Special Assistant to U.S. Secretary of Education Arne Duncan
Leader of the Denver Design Team (former)
U.S. Department of Education, LBJ Building
400 Maryland Ave, SW, Washington, DC 20202
(202) 260-1465, brad.jupp@ed.gov
2. Charlotte-Mecklenburg Schools, North Carolina (Dates of service: July 2007—June 2012)
CTAC served as technical counsel, project evaluator and fiscal agent for the Teacher Incentive Fund-supported Leadership for Educators' Advanced Performance (TIF-LEAP), which used SLOs to measure student growth in both the tested and non-tested grades and subject areas.
 - a. Peter Gorman, Superintendent (former)
1155 Avenue of the Americas, New York, NY 10036
(212) 852-7230, PGorman@newscorp.com

IV.B.3.b. Continued (Verifiable data demonstrating offeror's past effectiveness.)

- b. Trent Merchant, Board of Education Member and Liaison to TIF-LEAP
6726 Brookmeade Drive, Charlotte, NC 28226
(704) 377-0362, tmerchant@gmail.com
3. Lowell Public Schools, Massachusetts (Dates of service: June 2010—present)
CTAC began working with the Charlotte M. Murkland Elementary School to implement the Standard Bearer Schools (SBS) improvement model. Six additional schools are now engaged in the SBS process directly, and district support to all leaders and schools is being organized around attention to root causes.
 - a. Jean Franco, Superintendent
43 Highland Street, Lowell, MA 01852
(978) 674-4324, jfranco@lowell.k12.ma.us
4. Decatur Public Schools, Illinois (Dates of service: March 2007—June 2010)
CTAC conducted an assessment of readiness and capacity and then implemented the Standard Bearer Schools process, providing data analysis, technical assistance and training to five schools.
 - a. Gloria Davis, Superintendent
101 W. Cerro Gordo Street, Decatur, IL 62523
(217) 424-3010, GJDavis@dps61.org
5. Duval County Public Schools, Florida (Dates of service: January 2006—June 2008)
CTAC performed an assessment and evaluation of district readiness and capacity and then provided training and technical assistance to twenty-seven schools in the implementation of our Standard Bearer Schools process to link school, student and teacher learning needs, causes, school actions and initiatives.
 - a. Joseph Wise, Superintendent of Duval County Public Schools (former)
Co-Founder and Chief Education Officer, Atlantic Research Partners (current)
17 North State Street, Suite 1890, Chicago, Illinois, 60602
(877) 740-7240, jw@atlanticresearchpartners.org
6. Christina School District, Delaware (Dates of service: August 2003—July 2006)
CTAC conducted an assessment and evaluation of district readiness and capacity to undertake system-wide reform effort. CTAC also provided technical assistance based on our Standard Bearer Schools framework to create sustained improvements in student achievement, strategic management and policy, leadership, human resource development and management, and stakeholder satisfaction and ownership.
 - a. Joseph Wise, Superintendent of Christina School District (former)
Co-Founder and Chief Education Officer, Atlantic Research Partners (current)
17 North State Street, Suite 1890, Chicago, Illinois, 60602
(877) 740-7240, jw@atlanticresearchpartners.org

IV.B.3.c. Names, qualifications and experience of key staff that would be assigned to a project, including an explanation of how additional resources, if needed, would be identified and retained.

CTAC associates have extensive experience and expertise. Key staff are assigned to proposed services as expertise best aligns with specific service(s) needed. In addition to the key staff referenced below, CTAC has many additional senior level associates and partners, with a wide range of skills and experience, who can be added as needed. If additional resources are required, CTAC recruits senior level staff and candidates participate in an intensive interview process to ensure the highest quality personnel.

Jeffrey Edmison, Senior Director, National School Reform, will serve as Lead Project Manager. Jeff is responsible for key CTAC education initiatives relating to teacher and principal evaluation, performance-based compensation, school turnaround, and state-to-district collaboration. Mr. Edmison currently serves in a lead role for the teacher effectiveness and principal effectiveness projects using student learning objectives in New York State and provides organizational leadership for CTAC's engagements around the nation. Mr. Edmison previously served as Chief Operating Officer for the Christina School District, Delaware's largest district, providing leadership for the *New Directions in Christina* systemic reform effort. Through a methodical implementation of the Standard Bearer Schools process, the district significantly increased student achievement and created foundational changes in the organization. In addition, he has served as the Associate Superintendent of Operations for the West Contra Costa Unified School District in Richmond, California, and as the Regional General Manager for EdisonLearning, Inc. As a reform-minded leader, in both roles, Mr. Edmison led multiple system-wide efforts improving the educational and organizational outcomes for students.

William J. Slotnik, Founder and Executive Director, has overseen the growth of the Center into one of the nation's foremost providers of technical assistance, evaluation services, and policy support in the fields of education and community development. CTAC annually assists more than 90 organizations, school districts and state departments of education. He has provided extensive assistance to state education agency leaders, superintendents, state and local boards of education, unions and leadership teams throughout the United States. He has guided and supported the development of replicable systems of assessment, evaluation, and accountability to determine the performance and effectiveness of school districts, school by school, classroom by classroom, teacher by teacher, and student by student. He has led technical assistance and evaluation initiatives nationally which address such issues as student learning objectives, teacher and administrator evaluation, systemic reform, compensation reform, professional development, state-to-school and state-to-district interventions, and transforming underperforming schools, as well as leadership development and organizational capacity in community-based organizations. He has been the lead or co-lead author of numerous evaluations (including [Pathway to Results](#), and [Catalyst for Change](#) the first comprehensive, longitudinal evaluative studies of the impact of performance-based compensation on student achievement, teacher effectiveness and systems change) and articles, and provides briefings to members of the U.S. Congress, the U.S. Department of Education, state legislatures and departments of education, and the media.

Joseph P. Frey, Senior Project Director, Senior Associate for National School Reform, is responsible for key CTAC education initiatives relating to teacher evaluation, teacher licensure and certification, performance-based compensation, teacher preparation, state-to-district and state-to-school assistance, and college readiness. Mr. Frey previously served as the Deputy Commissioner, New York State Education Department (NYSED), Office of Higher Education. His prior positions included the Associate Commissioner, NYSED, Office of Higher Education, and Assistant Commissioner, NYSED, Office of Quality Assurance. Mr. Frey made substantial contributions to the successful New York State's Race to the Top grant award, and NYSED's successful Teacher

IV.B.3.c. Continued (Names, qualifications and experience of key staff.)

Incentive Fund grant award. Additional career highlights include Smart Early College High School Program and implementation of an initiative to transform school leadership in New York State. Mr. Frey developed a data-driven Statewide Plan for Higher Education that engaged all four sectors and a data-driven approach to policy decisions in higher education in New York State. He has played a leadership role in the creation of the state teacher supply and demand analysis. He worked on the development of the Regents' Teaching Policy, Teaching to Higher Standards: New York's Commitment and was responsible for the implementation of the plan and development of the first alternative teacher preparation program in New York State's history.

Donald B. Gratz, Ph.D., Senior Associate and Director, National School Reform, is Director of Graduate Programs in Education at Curry College. He previously served as Executive Director of the Alliance for Education. He co-led the Standard Bearer Schools process during the turnaround of Murkland Elementary School. He is one of the nation's leading experts on performance-based compensation. He coordinated the first phase of CTAC's evaluation of Denver's pay for performance initiative and guided the implementation of systemic reform initiatives in large districts throughout the United States. He is widely published in the area of performance-based compensation, including the recently issued The Peril and Promise of Performance Pay: Making Education Compensation Work.

Geraldine Harge, Ed.D., Senior Associate, National School Reform, has extensive experience in project coordination and performance management. She provides on-site assistance to superintendents, district and school leadership teams, principals and teachers. Dr. Harge is part of the CTAC team providing the training on student learning objectives for the new teacher and principal evaluation systems in New York State and she served in a leadership role for the federally funded TIF-LEAP partnership with the Charlotte-Mecklenburg Schools. She previously served as Superintendent of Schools in Berryessa Union School District, San Jose (CA) and Nye County School District, Tonopah (NV); as Director of Special Education in San Mateo Foster City School District (CA); and as Regional Superintendent, Principal, Counselor and Classroom Teacher in the Albuquerque Public Schools. Dr. Harge has nationally recognized expertise in rural education, special education, and systemic reform. She was honored as Nevada Superintendent of the Year.

Susan E. Kirkendol, Ph.D., Senior Associate, National School Reform, provides technical assistance at district and state levels and is a lead member of the team that launched CTAC's content development work for the implementation of student learning objectives (SLOs) in New York State. She is also a lead member of the team providing the training on how to develop, evaluate and train trainers on SLOs for the new teacher and principal evaluation systems for the Educational Service Center of Central Ohio. Dr. Kirkendol previously served as a Senior Research Program Analyst for Charlotte-Mecklenburg Schools' Leadership for Educators' Advanced Performance initiative. In that capacity she worked with teachers and administrators in low-performing schools to improve teacher effectiveness through the use of data to inform instructional practices. She also designed and implemented teacher professional development opportunities related to using data in a cycle of continuous improvement and the best practices in assessment, and helped facilitate a district-wide data-driven instruction initiative. Additionally, Susan has served as a Professor and Dean at Pfeiffer University and an Assistant Professor at Clemson University.

Guodong Liang, Ph.D., Research Specialist, serves in a key role for CTAC's Research and Evaluation work. Dr. Liang performs quantitative and qualitative data analysis and conducts comprehensive research for the Teacher Incentive Fund projects in Delhi, CA, Henrico County, VA and Prince William County, VA. Previously, Dr. Liang was an Educational Leadership and Policy Analysis Post Doctoral Researcher and a Research Teaching Assistant at the University of Missouri. His areas of research included the impacts of organizational resources on teachers' participation in professional learning, professional development activities on teacher outcomes and student achievement, and teacher performance evaluation on professional development activities.

IV.B.3.c. Continued (Names, qualifications and experience of key staff.)

Richard Larrabee, Senior Associate, National School Reform, guides the implementation of CTAC's turnaround services at school and district levels nationwide, including Lowell, MA, where he currently works in three schools and co-led the SBS process at Murkland Elementary School. He also led CTAC's field services team that conducted the groundbreaking professional development audit of the Schultz Center for Teaching and Leadership and the Duval County Public Schools. He previously served as Supervising Superintendent (overseeing all district regional superintendents), principal of a distinguished school (one of the nation's first CTAC-assisted Standard Bearer Schools), and as Director of Information Services during 30 years of service to the Cleveland Public Schools (OH). His areas of expertise include designing and implementing SLOs for purposes of teacher evaluation and performance-based compensation, using data to drive instructional improvements, school and district improvement, and data-driven accountability at classroom, school, and district levels.

Scott Reynolds, Senior Associate, National School Reform, serves CTAC's educational reform efforts through systemic planning, training, implementation, and support. He provides technical assistance at the school, district, state, and regional levels with a focus on performance-based evaluation and compensation systems. With several awards in STEM education, much of Mr. Reynolds' work has centered around the use of standards-based curricula and constructivist pedagogy to improve student and teacher outcomes. Mr. Reynolds previously served Charlotte-Mecklenburg Schools in the capacities of educator, facilitator, administrator, professional developer, and curriculum specialist. As the district's first SLO Specialist, he spearheaded the SLO work under the federally-funded Leadership for Educators' Advanced Performance initiative. In addition to presenting at regional and state conferences, he also served as a state level professional developer and as Vice President of the Classroom Teachers Association of North Carolina.

Lee J. Rutledge, Program Specialist, National School Reform, provides technical assistance at district and state levels related to CTAC's teacher effectiveness and school turnaround work. His areas of expertise include compensation reform, student learning objectives (SLOs), and using the Standard Bearer Schools process. He works with senior district leadership and give school teams in Lowell, MA. He is the liaison between the Center on School Turnaround and seven northeastern states through the Northeast Comprehensive Center. He also works on district-level SLO and school turnaround initiatives in California, Nevada, Ohio and Massachusetts. Mr. Rutledge held leadership positions on the Baltimore Teachers' Union Executive Board, New Teacher Steering Committee, and Negotiations Team, and was appointed to the Joint Oversight Committee responsible for implementing the landmark performance pay and peer review systems. Mr. Rutledge also taught middle and high school for nine years, and was selected in Baltimore's first cohort of peer-reviewed model teachers. He was appointed by Gov. O'Malley to the Maryland Council on Educator Effectiveness, which established the new state evaluation model for teachers and principals. He has also previously served as a leader of a School Improvement Team in a turnaround school.

Sylvia Saavedra-Keber, Senior Associate, Community Capacity Building, previously served for over thirteen years as the executive director of a Latino organization in the Greater Boston area which focuses on the cultural, social, economic and educational development of Latinos affected by poverty. Her areas of expertise include community building, community organizing, and educating and mobilizing communities of color. She has taken leadership roles in community efforts that have been successful in the areas of immigrant voting rights, housing, accessibility to education, equal employment opportunity, and quality health care, including accessibility to interpretation and translation services. A community trainer and mediator, Ms. Saavedra-Keber is a member of the Community Dispute Settlement Center of Cambridge and is a board member of the Cambridge Foundation. Ms. Saavedra-Keber has a background in management, was the Assistant Director of the Immigrant Unit at the Massachusetts Office for Refugees and Immigrants, and also served for many years as the Equal Employment Opportunity Director for the Massachusetts Department of Employment and Training.

IV.B.4. Offeror’s approach to meeting each of the mandatory requirements set out in Section III. STATEMENT OF NEEDS.

III.A. The Contractor shall:

Furnish all labor and resources on an as-needed, when-needed basis to increase student achievement in persistently low-achieving Virginia public schools. To increase student achievement, the contractor shall develop and implement an academic program for one or more of the core discipline areas of mathematics, science, history/social science and language arts using the following desired approaches or other proposed approaches approved by VDOE as a result of this RFP, as well as those that may be refreshed or added during the performance of any resulting contract. The contractor shall integrate all academic and support services to include the following turnaround principles or meaningful interventions designed to improve the academic achievement of students in persistently low-achieving schools. Services must be aligned with all of the following “turnaround principles:”

Introduction to the Standard Bearer Schools (SBS) Process

In this section, we provide an overview of the Standard Bearer Schools (SBS) process, outlining the general framework and tools CTAC has employed in our work with consistently underperforming schools over the past two decades. We then specifically address how this process aligns with each of the seven “turnaround principles”.

The SBS improvement model builds capacity at the school level to use multiple sources of data and specific analytical tools to develop plans and implement changes that address the root causes—organizational and instructional—of academic underperformance. Through the SBS process, we identify core academic programs in need of improvement.

The fundamental goals that ground the practices of SBS are to improve academic achievement for all students, particularly in the core academic programs of mathematics, science, history/social science, and language arts; to bring formal critical thinking around causation to the table when addressing school level problems; to involve students, parents and the community in improving learning; and, to assure that schools assume responsibility for student academic success. Strong leadership and good data are crucial, but not sufficient. The SBS model also requires all stakeholders to work together in a trusting relationship if meaningful transformation of teaching and learning is to occur.

If schools are to get different results for students, they must do things differently. Quality school improvement planning and implementation is the responsibility of the division as well as each school, but it requires greater leadership skill and higher priority than is currently the norm in most schools (and often better organized data than is the practice in many schools today). School improvement requires rethinking how the system works—building on strengths, correcting weaknesses and creating new tools and processes where gaps exist. The SBS model is not so much programmatic as it is systematic—it requires a deep understanding of the context and conditions of education that most affect academic growth, be they organizational, instructional, or personnel related.

The Standard Bearer Schools process helps schools, and their supporting divisions to:

1. Identify and address the causes—rather than the symptoms—of prevailing levels of student underachievement at schools.
2. Engage each school community—all teachers, all administrators, 30 percent or more of the parents and a representative number of students in grades 6 through 12—in analyzing the organizational conditions that are affecting student achievement.

IV.B.4: III.A. Continued (Furnish all labor and resources...to increase student achievement in persistently low-achieving Virginia public schools.)

3. Disaggregate and analyze data on student achievement in user friendly formats so that they can be used to inform school improvement planning.
4. Implement a multi-step planning and development process to link school and learning needs, their causes and school actions and initiatives.
5. Use whole school reform plans to identify those recurring issues that require intervention.
6. Establish functional links between curriculum and instruction, family and community engagement, professional development, and communications services to ensure effective, coordinated school-based and central office responsiveness to the instructional and organizational needs of schools.
7. Increase the capacity of principals, school teams and central administrative units to sustain increases in student learning.

SBS improvement planning addresses the quality issues that are central to high performing schools: the implementation of an instructional core in the classroom that assures alignment of the curriculum, pedagogy and student assessment; an assessment of the school culture and its support of a positive learning environment and high expectations for all children; the examination of teacher support and improvement structures; and the development of a feedback loop for managing and monitoring change.

The SBS process is built around the hypothesis that school and division capacity to turn around persistently low performing schools is enhanced by analyzing data, probing for causes of under-performance, and making effective, practice-changing decisions to significantly improve student achievement. SBS provides a powerful new model that addresses the root causes of under-performance in a systematic manner, leading to sustained improvement at the classroom and school levels. SBS builds the capacity to analyze student achievement data comprehensively, disaggregate that data by a range of factors and student sub-groups to provide a deep understanding of the “why” behind low student achievement, and take actions based on best practices in instruction and professional development.

Tools for Implementing the Standard Bearer Schools Process

Comprehensive Data Analysis (CDA). School planning teams must begin with a full package of achievement data—state achievement results and other division measures such as credit accumulation and recovery. Drawing upon these data from Indistar™, DataCation (if available), and other sources, CTAC prepares and studies the Comprehensive Data Analysis including graphic representations of the state assessment results, in the aggregate, by school and by grade level, and disaggregated by socioeconomic status, ethnicity, English language fluency, and disabilities. These are the categories the divisions and schools are mandated to follow as Proficiency Gap Groups for Annual Measurable Objectives. The CDA also includes other measures and data structures that the division and schools use and consider to be litmus tests of effectiveness.

CTAC begins this process by analyzing the rich data reported to the Indistar™ system and DataCation, SOL outcomes, School Report Cards, Graduation and Completion Indices and other data collected for the quarterly reports. These data are compared within the division and—where appropriate—the state context in preparation for demonstrating to a school, for example, how its tenth graders perform compared to other tenth graders in the division and state. It is also helpful to compare the current year’s data to two or more prior years’ data, so that achievement trends can be identified and monitored. CDA also includes reliable benchmark or formative assessment data from the current and previous years and any other *consistently administered* achievement data, such as the SAT, ACT, and Advanced Placement summaries. Multiple measures increase the accuracy and validity of the data analyses. CTAC utilizes formative data in for teachers in each identified school as a key component of this analysis.

IV.B.4: III.A. Continued (Furnish all labor and resources...to increase student achievement in persistently low-achieving Virginia public schools.)

Using Virginia's data linkage of individual student and teacher identifiers, CDA includes analyses of individual student growth over time and may include teacher performance analyses. Measurements of individual student growth render a clearer picture of the school's role in and contribution to student achievement. Where available, Student Growth Percentiles are incorporated into these analyses.

Organizational Assessment Survey (OAS). Educators, parents, and children know that the conditions at their schools affect how much learning takes place. Educational research also shows that school and classroom conditions are powerful players in achievement, and they are the conditions over which the school has the most influence and capacity to change—as opposed to home conditions, for example. Organizational assessment is a means for identifying and addressing conditions at each school. We use this survey of teachers, administrators, students, parents, and other community members to develop a picture of the conditions of the school in seven areas known to impact school quality: school context and readiness; leadership and improvement planning; curriculum and instruction; teacher effectiveness and evaluation; student responsibility and support; family and school relationships; and, division system of support. We will customize our surveys including some of the same measures included in the Virginia Youth Survey conducted in 2011 to assure that we have information on all of the relevant indicators of school quality.

Taken together, the CDA and OAS are compiled and reviewed by CTAC staff members. The goal is to understand the context of the school, areas of need, strength, and assets. These data are organized in graphic displays in order to understand and address perceptions as well as the reality of the effectiveness of the school. Organizational assessment data grounds school improvement efforts in the realities of each school. With this foundation, CTAC and the schools have the knowledge and constituency support to improve the conditions of the school that most impact student learning.

The School Profile. The CDA data on student achievement, the OAS data on organizational conditions, and the school and division demographic data are compiled into a School Profile. One of the first missions of the school planning team is to review the data currently compiled and to decide what other data may be included in the profile. The objective is to provide the planning team with a comprehensive picture of school achievement and the conditions to be used to probe for explanations of the achievement and solutions for increasing achievement. Their insight into likely issues at the school are important to ensure that all relevant issues are examined by the team.

Initially, CTAC prepares the School Profiles but subsequently, we train school leaders in their preparation and use. We also train the leaders in how to use the profiles to probe for the causality of underperformance on an individual school basis. This is a collaborative process with school leaders, and includes adjusting graphic displays to clarify issues of concern. CTAC staff members work with the planning team, demonstrating alternative strategies for displaying data. This allows the team to design a coherent story about school performance to relay to the school as a whole. The resulting data are shared with work groups conducting the Root Cause Analysis.

Root Cause Analysis. CTAC trains school leaders in several field-tested methodologies for probing root causes. These include several Total Quality Management tools that are useful to school planners such as the "5 Whys", "Cause and Effect" or "Fishbone Diagram", and flow charts. In situations where there is emotional content to discuss, Edward DeBono's "Six Thinking Hats" may be the best initial strategy. CTAC makes use of a large bank of methods that organizations use in their improvement processes, and tailors them to the needs of individual schools, recognizing that one size does not fit all.

IV.B.4: III.A. Continued (Furnish all labor and resources...to increase student achievement in persistently low-achieving Virginia public schools.)

Figure 1 presents an example of an application of the “5 Whys” methodology in a root cause exercise.

<p>Figure 1. “Five Whys”: While some ELL students are the highest performers in this elementary school, others are the lowest performers.</p>
<p>Why are some ELL students performing at such low levels?</p> <p>Not all parents are equally involved. Research shows that parents of students whose performance is lower on standardized tests and in grades are less likely to attend parent/teacher conferences.</p>
<p>Why are some parents less likely to attend parent/teacher conferences?</p> <p>Our parent survey results show high agreement for “communicates with me in a language that I understand” and “contacts me when my child breaks school rules” but low agreement for “keeps me informed about my child’s academic progress” and “I feel welcome in my child’s school.”</p>
<p>Why do some parents feel like the school is not keeping them informed about academic progress, and feel unwelcome?</p> <p>The averages are similar, and most teachers report delivering academic updates to the parents in person. Parents who do not attend are not as updated. Letters and the website (both translated) are the primary way of engaging parents in the academic development of students.</p>
<p>Why don’t letters and the website make all parents feel welcome?</p> <p>Parents who did come to the last set of conferences were asked why they came, and the number one response was that a teacher asked them directly. Some parents do not have regular internet access.</p>
<p>Why don’t we ask more parents personally to attend?</p> <p>We often don’t see the other parents, or don’t have updated phone numbers, it is time consuming to pursue contact with new parents, so we get set in a cycle of speaking to the same group repeatedly.</p>
<p>Solution</p> <p>Student-centered events, which students are excited to invite their parents to, and which will be held at a variety of times to accommodate a wide range of work schedules, will be used to establish better relationships with parents with an eye towards sustainable academic interventions for their children. Teachers will collaborate to allow for shared meetings and to ensure all parents are contacted.</p>

Implementing the Standard Bearer Schools Process

The SBS process unfolds through a series of phases. In the initial Diagnostics phase, usually a 3-6 month period, CTAC works with school leaders to gather the school, student, and teacher data that comprise the Comprehensive Data Analysis. CTAC disseminates The Organizational Assessment Survey and prepares results for review. This is a period of study as CTAC begins to understand the school context and current status of student performance. At the same time, CTAC fosters collaborative relationships with all stakeholder groups and work with the school to organize the working team at the school. As a more complete picture of the current status of the school emerges, CTAC guides the school-based team in the development of the School Profile. This summary view of the school is used in the Root Cause Analysis phase, where the goals are to identify gaps in student learning and to set priorities for next steps. School leaders and teachers examine these priorities and collaborate to develop a Plan of Action in the next phase. The school plan is adapted and strategies for promoting success are outlined. In the final phase, the new plan is Shared, Revised, and Implemented.

IV.B.4: III.A. Continued (Furnish all labor and resources...to increase student achievement in persistently low-achieving Virginia public schools.)

The steps undertaken in each phase are outlined in Figure 2 below. The descriptors accompanying each step identify typical actions that take place during that step. They are not intended for use as a checklist but rather as a heuristic or prompt to assist the planning team in being thorough in their analysis. The focus of the analysis is based on work completed by CTAC and all team members during the initial diagnostic phase. A vital early step, once areas of need have been identified, is to prioritize the most important issues to be addressed in the school. The foci of this work can include, but are not exclusive to, working more closely with special needs students or those with limited English proficiency, eliminating barriers to school performance, addressing staff professional development needs, or developing new strategies for improving parental engagement. The example below includes ten steps, but the process can be divided into fewer steps. Nonetheless, as good teachers know, when mastering a new process, it is often better to break it into several smaller steps.

Figure 2: Ten Step Process	
Phase 1: Diagnostics	<p>Step One: Establish norms and set purpose.</p> <ul style="list-style-type: none"> ▪ Develop working norms for the group. Include considerations to build group trust and prepare to share findings with the wider school community. ▪ Revisit standards as the primary benchmark for student learning. ▪ Revise, as needed, the alignment among standards, materials, teaching practices, and assessments. ▪ Develop a statement of purpose based on increasing student learning.
	<p>Step Two: Analyze perceptual data from stakeholders.</p> <ul style="list-style-type: none"> ▪ Consider the population of the school and community. ▪ Examine their perceptions about the school using the Organizational Assessment Survey and other sources. ▪ Develop objective statements about what the data show.
	<p>Step Three: Analyze student data coinciding with conditions shown in the OAS.</p> <ul style="list-style-type: none"> ▪ Disaggregate the annual achievement data by income, ethnicity, program, gender, grade level, language, teacher and other demographic or program categories that may help explain achievement outcomes. ▪ Look for patterns in data at the school, grade, and student level. Look at the clusters or subtopics in the assessment for greater specificity. ▪ Look at other assessments of the same students for parallel findings. ▪ Look at other data, including but not limited to perceptual data, behavioral data, school program and process data. ▪ Use tests of statistical significance to determine if the differences matter.
Phase 2: Root Cause Analysis	<p>Step Four: Identify critical issues.</p> <ul style="list-style-type: none"> ▪ Determine through data analysis and then select those areas where significant groups of students are achieving below standard and/or that show student achievement is flat or has declined over time. ▪ Record issues that emerge from observable patterns in the data. ▪ Look for similar trends in multiple years of data. ▪ Compare with state, district and demographically similar schools. ▪ Identify areas of growth and/or strength in student achievement patterns. ▪ Examine relationships among or between critical issues and events (e.g., math scores are down; new learning standards adopted during the previous year).
	<p>Step Five: Probe for causation.</p> <ul style="list-style-type: none"> ▪ Continue to ask questions about observable patterns in the data and about the character of the data with regard to the critical issues identified. ▪ Develop hypotheses about the possible reasons for the observed patterns and trends. ▪ Use perceptual, program, and teacher data to test hypotheses and to probe for possible causes. ▪ Collect additional data and input if needed (e.g., conducting interviews or focus groups with students, parents, and/or teachers on a topic).

IV.B.4: III.A. Continued (Furnish all labor and resources...to increase student achievement in persistently low-achieving Virginia public schools.)

Phase 3: Develop a Plan of Action	Step Six: Determine priorities for improvement.
	<ul style="list-style-type: none"> ▪ Determine what the school <i>can change</i> (programs, processes, professional knowledge and skills); what it <i>may influence</i> (behavior, parent involvement, communication); and where it <i>may need to intervene</i> (pre-school, tutorials, parent visits, etc.). ▪ Select a manageable number of priorities as the focus of school improvement. The priorities should be grounded in the root causes of the critical issues identified above.
	Step Seven: Develop strategies.
	<ul style="list-style-type: none"> ▪ Search for potential strategies to address the priority improvement areas. ▪ Use educational research findings or best practices as a decision-making tool when selecting and developing strategies. ▪ Plan strategies to address the priority improvement areas. ▪ Determine when professional development is the strategy itself and when it is a support for the implementation of another strategy. ▪ Consider conducting small action research projects to test out strategies before deciding on full implementation. ▪ Consider how you will know that a strategy is producing the desired result.
Phase 4: Share, Revise and Implement the Plan	Step Eight: Review and revise the school plan.
	<ul style="list-style-type: none"> ▪ Communicate with stakeholders about the planning process and opportunities for input. ▪ Evaluate the progress on previous improvement plan activities. ▪ Consider how the new priorities fit into the current plan. ▪ Ascertain that the budget will support the improvement priorities. ▪ Draft a proposal for the revision of the school plan that includes the rationale for any change and the impact on resources (staff and funds). ▪ Include a description of the rationale for implementing a new strategy, the expected results, and the planned evaluation of the effectiveness of the strategy.
	Step Nine: Share decisions and revise again as needed.
	<ul style="list-style-type: none"> ▪ Share the key elements and actions of the draft plan and solicit input from representatives of the stakeholders. ▪ Ascertain from the process any implementation needs of staff members. ▪ Agree on and record implementation activities, dates, and timelines for completion.
Phase 4: Share, Revise and Implement the Plan	Step Ten: Implement the new plan.
	<ul style="list-style-type: none"> ▪ Begin the new school term with a review of the plan priorities and strategies. ▪ Designate plan monitors to help the school stay on task, provide updates, and celebrate milestones. ▪ Review the new achievement data from the spring assessment and begin the process again.

As is evident from the illustration, school improvement planning is a cyclical process. It requires a leader with strong management, analytic, and communication skills, all of which are developed through the process itself with assistance from CTAC staff. It is important to recognize that this process is *recursive* so that the planning team may return to an earlier step or phase for clarification, focus, or re-direction. It is this recursive nature of whole school reform planning and implementation that allows schools to “get it right,” to make mid-course corrections as needed. It is also possible, that multiple teams within the school could be working on separate needs simultaneously. Whether this is possible or not depends largely on the breadth of leadership skills within the school.

Through the Standard Bearer Schools’ data analysis, organizational assessments, and inclusive planning processes, the school teams are better equipped to develop strategies and priorities, and to realign management systems based on actual data on student achievement and school conditions. Teachers will be able to utilize data in a more powerful way to closely monitor the progress of their students and to effectively reach out to other teachers and professionals for best and effective practices for meeting educational challenges that they may be facing. This creates a pathway for site improvement that is comprehensive, coherent and fully focused on student achievement.

IV.B.4: III.A. Continued (Furnish all labor and resources...to increase student achievement in persistently low-achieving Virginia public schools.)

Putting the Standard Bearer Schools Process in Place

CTAC provides technical assistance and training to identified schools—their principals, leadership teams, faculties and parents—and, when appropriate, to division personnel responsible for curriculum, instruction, assessment, technology, professional development. Typically CTAC staff members have ongoing interactions with the school principal and the school planning team, consisting of the principal, teachers, parents and community members. CTAC works with the assigned district liaison to assure smooth transfer of data and division services to the school, as appropriate. In addition, we meet regularly with the liaison to offer our recommendations and discuss the division's perspectives on proposed changes. Regular meetings are also scheduled with the Superintendent, to discuss progress to date and plans for the future.

The qualitative and quantitative data that the schools collect are used in tandem as the basis for probing for causation. This approach builds on the strengths of any school improvement planning currently conducted in the schools, while adding the most critical missing elements—broad-based participation and a focus on causality. Moreover, because the principals are pivotal to the success of this process, they receive specialized training in introducing and implementing the Standard Bearer School process, and in leading their school communities in responding to findings. The school improvement team members serve as catalysts for spreading capacity to other school personnel.

Schools engage their primary constituents—teachers, administrators parents, community leaders, and students—in conducting organizational assessments. These CTAC assessments, which can be customized to specific priorities, provide the critically needed basis for identifying the conditions at each school that affect the quality of learning. When the school conditions are identified and compared with specific information on student achievement, it becomes possible to correlate particular conditions with particular levels of performance. As conditions are identified that appear either to enhance or impede student achievement for particular constituencies, CTAC trains school improvement teams to perform a causal analysis, uncovering the root causes of those conditions. Correcting or building on the conditions most closely associated with student achievement becomes the basis for each school's improvement plan.

IV.B.4: III.A.1

Provide strong leadership by: (1) reviewing the performance of the current principal; (2) either replacing the principal if such a change is necessary to ensure strong and effective leadership, or demonstrating to the state education agency that the current principal has a track record in improving achievement and has the ability to lead the turnaround effort; and (3) providing the principal with operational flexibility in the areas of scheduling, staff, curriculum, and budget.

The principal plays the pivotal role in the SBS process, typically as the leader of the site-based team. Therefore, a critical first step in the SBS process is to conduct an initial analysis using our Principal Readiness and Effectiveness Protocol (PREP) to establish whether the leader has the requisite skills to lead the process. PREP is based on common characteristics associated with strong leadership as determined by a review of common principal evaluation rubrics as well as our practice. These include: a shared vision (Multidimensional Leadership Performance Rubric, Learner-Centered Initiatives, 2013), culture of collaboration (ISSLC standards, CCSSO, 2008), a data-driven focus to improve achievement (Marzano, 2012), encouragement of parental involvement (Marshall, 2013), and maintenance of integrity and fairness (Multidimensional, ISSLC). Only McREL and Marshall also specifically identify an ability to manage change as essential to principal success.

IV.B.4: III.A.1 Continued (Provide strong leadership by: (1) reviewing the performance of the current principal, etc.)

PREP also incorporates additional characteristics needed by principals leading turnaround schools. To lead change that is transformative and lasting, leaders of turnaround schools must be results-oriented, with a clear and sustained focus on student achievement. They must be trusted and influential. They must be able to review current processes critically, determine potential impediments for student and teacher performance. And, they must be viewed by staff as capable of making tough decisions while maintaining an appropriate level of support to reach common goals (Kowal & Hassel, 2011; Mass Insight Education, 2012).

The PREP summary serves as the baseline measure of principal performance and will be reviewed with the division liaison. CTAC has frequent contact with the principal, with multiple opportunities to observe his/her skills, abilities, and effectiveness. As such, principal evaluation becomes a simultaneous process as the SBS process unfolds. We are in a unique position to determine how well the principal is able to “move the needle”, and in our regular contact with the division liaison, we discuss our findings and make recommendations for change if warranted.

The goal, however, is to foster the development of the current principal whenever possible. CTAC supports principals through direct coaching. We draw on what research has identified as effective leadership practices associated with student achievement in consistently low-performing schools. CTAC works with school principals through the SBS process and by coaching to:

- Create and sustain an ambitious, commonly accepted vision and mission for organizational performance;
- Engage deeply with teachers and data on issues of student performance and instructional services quality;
- Efficiently managing resources, such as human capital, time, and funding;
- Create physically, emotionally, and cognitively safe learning environments for students and staff;
- Develop strong and respectful relationships with parents, communities, and businesses to mutually support children’s education; and
- Act in a professional and ethical manner. (CCSSO, 2008; Marzano, Waters, & McNulty, 2005; Stronge, Richard, & Catano, 2008).

Mentoring of principals is an ongoing process, based on contextual, performance, and climate data collected on site. CTAC staff members meet with principals, coach them through the data review process, assist in planning, and advise on effective management of collaborative efforts. CTAC recommends additional professional development as warranted and monitors to ensure that any training is effective. CTAC assists each principal in the establishment of a plan of effective human capital management decisions at the school that align to his or her instructional vision. This plan provides principals with long term capacity to successfully manage critical human capital decisions that have direct impact on student learning. In addition, the collaborative nature of the SBS process and the need for shared responsibility enhances the sustainability of change and can contribute to successful succession planning.

Principals’ success at leading turnaround efforts is dependent on their ability to institute new ways of addressing old problems. Operational flexibility is often necessary to change the status quo and be responsive to the needs and demands that arise during reform. The SBS process takes a broad view of all areas of the school community that impede learning. Should schedules, staffing, curriculum and/or budget become the focus of the issue or the catalyst for improvement, CTAC will recommend and seek to provide the principal the leverage and flexibility to address the need. Care must be taken to balance the desire and need for flexibility. Change in school operations must be anchored to a need borne out by the data through the collaborative SBS process. In this way, the reason for the change and impact that change will have on the system is understood, more easily accepted and helps to prevent reform fatigue.

IV.B.4: III.A.2

Ensure that teachers are effective and able to improve instruction by: (1) reviewing the quality of all staff and retaining only those who are determined to be effective and have the ability to be successful in the turnaround effort; (2) preventing ineffective teachers from transferring to these schools; (3) providing job-embedded, ongoing professional development based on the teacher evaluation and support systems and tied to teacher and student needs; (4) working with the school division or other state or local public educational body to recruit and recommend teachers and a leader(s) who have a proven record of success of increasing student achievement; and (5) recommending necessary restructuring of teacher and leader contracts.

CTAC ensures that staff members demonstrate a readiness to teach, as described in *The Turnaround Challenge*. Teachers must share the responsibility for student learning, and in collaboration with peers, differentiate instruction as indicated by formative assessment. Above all else, teachers must be active participants in a continuous improvement.

If we want all teachers and principals in every school to be able to be effective with every student, we need a singular focus on attaining the school's instructional vision. As a substantial and growing new body of research suggests, the vision must drive strategic alignment, not only of curriculum, instructional strategies, and assessment, but of all human capital decisions, from recruitment to hiring, induction, and professional development (see Milanowski & Kimball, 2010; Odden & Kelly, 2009; Weisberg *et al.*, 2009; Hill *et al.*, 2010; Behrstock *et al.*, 2009). Therefore, it is essential to design a method for managing the human capital at the school that dramatically changes the way of doing business and substantially improves student results.

The key is to use what a school values as its instructional vision and build a human capital management process around it to ensure that it recruits and retains teachers and leaders who can help realize this instructional vision. CTAC assists schools to think through the critical issues and establish policies that:

- *Align hiring policies with the instructional vision to ensure that new recruits and potential transfers possess the knowledge and skills needed to support a school's approach to student learning.* By formalizing these procedures, we can more effectively narrow the candidate pool and select only high quality candidates for interviews. The school uses interview protocols and other screening mechanisms such as demonstration lessons to help ensure that new hires and transfers understand, embrace and can carry out the instructional vision.
- *Assist schools to develop a mentoring/induction approach consistent with its instructional vision.* It is well known that nearly half of new teachers leave the profession within the first five years. When teachers leave because of lack of guidance and support, potential talent is lost unnecessarily. Related fiscal costs can amount to upwards of \$20,000 per teacher (National Board Resource Center, 2010).
- *Institute Student Learning Objectives (SLOs) as a tool to both measure and support teacher practice.* The use of SLOs (as described below in section III.A.4) is one suggested instructional improvement process to assist teachers (in collaboration with the principal) to implement the instructional vision in their classes. SLOs support meeting Standard 7 of the *Guidelines for Uniform Performance Standards and Evaluation Criteria for Teachers*, the measurement of student academic progress. SLOs are being used in numerous jurisdictions as measures of student growth and could be used in Virginia as one of the two measures for student academic progress, as required by the Commonwealth.

IV.B.4: III.A.2 Continued (Ensure that teachers are effective and able to improve instruction by: (1) reviewing the quality of all staff...(2) preventing ineffective teachers from transferring to these schools; (3) providing job-embedded, ongoing professional development...(4) working with the school division...to recruit and recommend teachers and a leader(s)...and (5) recommending necessary restructuring of teacher and leader contracts.

- *Ensure that the evaluation of teacher practice is consistent with the educational standards and pedagogical practices (teacher standards) included in the instructional vision.* Evaluation procedures outlined in *Guidelines for Uniform Performance Standards and Evaluation Criteria for Teachers* are completed as required, with additional support for the principal as warranted.
- *Use the instructional vision and how well teachers are able to implement it, to inform tenure and placement decisions,* including creating a joint teacher/administrator peer review and support committee to guide and assist teachers to be successful in the classroom.
- *Support teachers with professional development that will assist teachers to improve student learning consistent with the instructional vision of the school.* Professional development must be driven by findings from the Standard Bearer Schools process, from observations of teacher practice and from the Student Learning Objectives (SLO) process.

We customize professional development accordingly, using a tiered approach that embeds the most intensive support at critical points in time to teachers whose needs are the greatest. A similar approach is used with principals to support development of their instructional leadership capacity. We extensively use mentoring and coaching to tailor support and ensure transfer of new knowledge into instructional and leadership practice. Specifically, we will:

- Use the twin pillars of effective teaching practice and student learning to identify teacher leaders and empower them to model best practices and strengthen the instructional vision for the school. A school and its leader must entrust teacher leaders to build a positive school climate for student learning and create an environment where educators want to work. Teacher attrition is a serious problem in our high need schools, especially among the highest performing teachers. Creating an environment of trust and educational support are key ingredients in retaining these highly skilled teachers (see Hirsch, 2012).
- Strengthen the teacher pipeline, by collaborating with local teacher preparation institutions to better align the preparation and development of new teachers with the school's instructional vision. The teacher preparation institutions need to better understand the knowledge and skills that will form the basis for evaluating new teachers and the instructional vision that will steer their practice. This will be pivotal in shaping pre-service programs, resulting in a more effective transition from teacher education to actual effective teaching practice.

The instructional vision must be the primary driver of a principal's decisions about appropriate staffing and responsibilities, within the limits of fiscal and contractual obligations. The Standard Bearer Schools process assists principals in thinking through which education issues need to be addressed, what the priorities for improvement are, what strategies will be employed and how resources will be utilized to address those critical education issues. Professional development that demonstrably improves the practice of all teachers is pivotal, since the SBS process is geared toward ensuring that more teachers are more effective with more students.

IV.B.4: III.A.3

Redesign the school day, week, or year to include additional time for student learning and teacher collaboration.

On a daily basis, schools face a timing dilemma between limited schools hours and increasing instructional demands, leading some researchers to refer to schools as “prisoners of time” (National Education Counsel on Time and Learning, 1994). Various organizations have divided school time into various segments:

- Allocated time which includes the scheduled hours of attendance;
- Allocated class time which is the specific amount of time devoted to a class as specified in the schedule;
- Instructional time which is the amount of class time that is used for instruction, minus the time to transfer from one class to another, to hear announcements, or other administrative-type tasks associated with the class; and,
- Academic learning time or engaged learning time which is the subset of time during which students are actually attending to and actively engaged in the learning process.

The problem for schools has been that the latter category may not be given appropriate consideration in the scheduling process as well as in the instructional strategies selected. Without extra funding, the goal is to find ways to amend the schedule to allocate increased time for engaged learning, and less time to the other activities of the day. Often, we have found the most controllable time demands are those related to record keeping and class transfers. By reducing time engaged in those processes and making minor adjustment to schedules, more time can be allocated to active class engagement and creating time for teachers to collaborate in lesson development in meaningful and protected planning periods. Recently, one of the principals in a school working with CTAC in Lowell, MA was able to adjust the schedule to allocate a full one and a half hours one day a week for Professional Learning Community (PLC) planning.

CTAC has also worked with schools to rearrange the existing schedule to extend learning time for students, and reduce interruptions to instruction. Myriad schedules can be built to accommodate the needs of staff and students. Where feasible, these include extending the school year or perhaps creating a year-round cycle. The Pennsylvania State Education Association notes that secondary schools have often gone to a 4 x 4 schedule wherein students attend 4 90-minute classes per semester, or an 8 class schedule, attending classes every other day. Less common are trimester approaches to scheduling or mixed scheduling within a single school.ⁱ CTAC works with the principal and teacher leaders to determine whether any of these approaches will work for the school within the parameters of personnel and budget restrictions.

Benefits of these changes include creating more focused planning time for teachers to allow them to concentrate on the issues uncovered in the root cause analysis. Targeted professional development can be offered on site during these times, without reducing time for student learning. This is accomplished by streamlining and cutting inefficiencies that have eaten away at instructional time. The key here is that the leadership team takes an objective view to improve efficiency in scheduling and the use of planning time. Often, this is a “win win” situation: staff members appreciate the additional time to plan and students benefit from improved instructional approaches.

Regardless of the method for re-allocation of time, CTAC ensures that the time is used effectively. It is clear that, “Simply adding time to the school year or day would not likely produce large-scale gains in student achievement. Rather, what research studies repeatedly find is that in education, quality is the key to making time matter. Of particular importance is providing curriculum and instruction geared to the needs and abilities of students, engaging them so they will return day after day, continuing to build on what they have learned. In other words, educators must—to the greatest extent possible—make every hour count.”ⁱⁱⁱ In effect, quality instructional engagement will always be the key to success, in any scheduling format. CTAC will, therefore, focus on the instructional program, as described in the following section.

IV.B.4: III.A.4

Strengthen the school's instructional program based on student needs by (1) ensuring that the instructional program is research-based, rigorous, and aligned with state academic content standards; (2) providing comprehensive, coherent, manageable and integrated instructional and support programs; (3) recommending which existing programs are to be continued and which programs are to be eliminated; and (4) consistent with the state Standards of Learning (SOL), recommending alignment of curriculum, instruction, classroom formative assessment and sustained professional development to build rigor, foster student-teacher relationships, and provide relevant instruction that engages and motivates students.

The heart of the Standard Bearer Schools work is to identify issues of teaching, environment, management, or policies that affect student learning. During the Root Cause Analysis phase, CTAC builds the capacity of schools and divisions to use data-driven decision making to improve instructional practices, policies and student outcomes. Schools and divisions alike are characteristically data rich and information poor. Our technical assistance challenge is to build school capacity to leverage data system analyses into sustainable gains in student achievement. The comprehensive and systemic use of student assessment data, informed by perceptual data on school culture, curriculum, instructional competence and the like, drives CTAC's work.

The SBS process ensures alignment among State Standards of Learning (what we want our students to learn), assessments (what we use to measure attainment of the standards) and teaching practice (what educational practices will help ensure a successful approach). CTAC's technical assistance supports the school's implementation of an integrated, customized professional development plan drawing on our expertise to improve instructional practice by using SBS practices to unpack the Standards of Learning. In Step 10 of the SBS process, a shift is made to focus evaluating the plan and guiding teachers as they evaluate the success of implementation both from a grade-level and vertical perspective. Collecting data on effectiveness of strategies is an ongoing process with resulting mid-course corrections refining the process.

Another key strategy CTAC will introduce to assist in instructional reform is the implementation of Student Learning Objectives (SLOs). In collaboration with the Denver Public Schools and the Denver Classroom Teachers Association, SLOs were developed and implemented in 1999. Subsequently, CTAC worked with the Austin Independent School District, Charlotte-Mecklenburg Schools, districts in Nevada and California as well as New York, Ohio, and Connecticut Department of Education to implement SLOs. Today, SLOs are being used in 32 states and numerous jurisdictions as part of their teacher evaluation procedures as well as teacher practice guidelines, including New York, Ohio, Rhode Island, Indiana, Georgia, and Hawaii.

SLOs are long term goals for student learning crafted by teachers. In many ways, SLOs mirror the general structure of SMART goals, with care taken to ensure that the SLO is specific, measureable, attainable, relevant, and time-delimited. SLOs typically provide a more specific focus on strategies and steps toward improving student learning. Typically, SLOs require the selection of the student population, learning content, instructional strategies, assessments, interval, and student growth targets. SLOs are recursive in development and outcome. As teachers craft their SLOs, they often realize that identification of one element will affect the next. And, during the SLO interval as well as upon completion, SLO outcomes are evaluated, potentially leading to changes in instructional strategies or the focus of later teaching. Teachers and principals reflect on the outcomes and use lessons learned to refine practice and guide subsequent instruction.

SLOs development requires consideration of the following issues:

- *Learning content:* Teachers work in grade- or content-level teams to determine the most important learning content for focus. This requires a careful review of current student data, trends in performance, and contextual factors that have affected student learning.

IV.B.4: III.A.4 Continued (Strengthen the school's instructional program based on student needs.)

- Frequently, the focus for SLOs becomes clear as the result of the root cause analysis. This is a standards-based approach, with teachers citing the specific Standards of Learning to be addressed in an SLO.
- *Student population*: Teachers identify which students are included in their SLO and demonstrate an understanding of their students' strengths, needs, interests and skills that could affect SLO outcome.
- *Instructional strategies*: The learning content selected influences which instructional strategies are appropriate to address the particular students in the classroom. CTAC guides teachers as they identify instructional strategies that are research-based. The SLO process provides teachers with a means for identifying professional development that could be offered in a just-in-time, embedded format. This ensures that teachers receive assistance, if needed, to implement the selected strategies.
- *Assessments*: Assessments are identified or created to address the specific content for use as pre- and post-assessments. Formative measures are encouraged during the SLO interval to gauge students' progress in learning and to guide instruction, consistent with Standard 4 in the *Virginia Standards for the Professional Practice of Teachers*.
- *Interval*: Teachers select start and end dates for the SLO that are consistent with the depth of learning and pacing guides, if available.
- *Student growth targets*: Teachers identify rigorous and attainable growth based on their knowledge of students, the pre-assessment and/or other baseline measures and trend data. Teachers are encouraged to consider vertical planning and the knowledge that students must master to be successful in more advanced coursework.

SLOs serve multiple functions. They are both a measure of teacher practice and of student learning. Teachers' pedagogical knowledge and skill in understanding student data become readily apparent as they craft their SLOs. And, as SLOs typically involve pre- and post-assessments, they provide a measure of student progress. Teaming these two aspects of the process together can be particularly beneficial for a principal in a turnaround school who must be ready to act quickly to identify gaps in teacher knowledge to be addressed with professional development while keeping student learning front and foremost. From the perspective of accountability, SLOs are measures of student growth and could be considered as one of the measures of student academic progress required by VDOE. SLOs are often used in teacher evaluation systems in other states.

SLO implementation encourages the ongoing use of formative measures of student learning and teacher practice, to ensure progress is continual and students are on track to meet targets set. Collegial and collaborative conversations in the development of SLOs among teachers and between teachers and administrators center on the establishment of a common vision of great teaching. They open the door to meaningful conversations about pedagogy and supports needed to be successful in the classroom. Practices encouraged by other initiatives such as data-driven instruction, response to intervention and teacher observations are consistent with and are routinely embedded in the SLO process. As such, we have found that SLOs are often the "glue" that unifies and helps teachers make sense of multiple initiatives and processes that are in place in the schools.

The process of implementing SLOs has a valuable but often unexpected consequence. Gaps in instructional practices that are affecting student performance become clearer as teachers and principals work together to develop high quality SLOs. Teachers' success at crafting and implementing SLOs may expose previously undetected gaps in pedagogical knowledge. Programs that are ineffective become apparent as SLO outcomes are reviewed. These gaps may provide the site-based team with a roadmap pointing to issues needing further exploration at a deeper level using root cause analysis, helping the team to determine where reform efforts should be focused. In some cases, the team emphasizes the implementation of specific instructional practices more clearly

IV.B.4: III.A.4 Continued (Strengthen the school's instructional program based on student needs.)

tied to a research base. In other cases, the focus may be on the needs of subpopulations that are academically at risk, such as students with limited English proficiency and those with disabilities—subpopulations that are historically included in the Proficiency Gap Groups. CTAC employs educational specialists prepared to participate in the SBS process and assist the school community to address these and other issues discovered in the root cause analysis, using current research-based practices.

Equally important is that research informs us which practices or approaches do not have a research-base upon which to rely on and where caution must be exercised. The SBS process helps uncover the root cause of educational issues that must be addressed so that appropriate priorities and research-based practices can be implemented. For example, when addressing the needs of students with limited English proficiency, CTAC would ask the site-based team to consider research supporting improved effectiveness through:

- Strengthening reading achievement in English by strengthening reading achievement in the primary language.
- Using lessons learned from research-based instructional practices shown to be effective for English proficient learners to refine instruction for non-English proficient learners.
- Modifying instruction based on the language limitations of the students.
- Employing best practices to assist LEP students to acquire oral English language development, especially vocabulary.
- Infusing English language development into other content areas.
- Utilizing effective approaches, such as the Sheltered Instructional Observation Protocol (SIOP) and Specially Designed Academic Instruction in English (SDAIE) to assist students to acquire the needed English language skills (Council of Chief State School Officers (CCSSO) 2004; Comprehensive School Reform Quality Center (CSRQC) 2005; Northwest Regional Educational Laboratory (NWREL) 2004; American Institutes of Research (AIR)/WestEd, 2006).

In the SBS process, data are constantly being collected to measure the effectiveness of programs and instruction. These data include measures of student learning and teacher observational data as well as anecdotal data collected from conversations with students. Teachers and administrators will work with CTAC to dive into these data to determine which programs should be continued and which should be eliminated based on outcomes. The key element here is timing. Programs must be allowed to be in place for sufficient time to have a noticeable impact on student learning. However, the ongoing collection of perceptual and student outcome data will serve as an “early warning system” to alert the team that a program might not be progressing as desired, and to allow for mid-course corrections.

IV.B.4: III.A.5

Use data to guide instruction and for continuous improvement, including providing time for collaboration on the use of data and providing formative and providing ongoing reports on program effectiveness to include, but not limited to, student achievement, parental involvement, student attendance, and student discipline.

As referenced above, SBS starts with a thorough understanding of quantitative student achievement data. This is then supplemented with comprehensive knowledge of the organizational factors at the school—the school's conditions that most influence student achievement. Presenting disaggregated data on outcomes, (e.g., student achievement and Graduation and Completion Indices), and on

IV.B.4: III.A.5 Continued (Use data to guide instruction and for continuous improvement, etc.)

factors likely to influence those outcomes, (e.g., school facilities, teacher quality, and curriculum materials), in a user-friendly, accessible format to school personnel who are charged with getting better results is at the heart of the SBS process.

Facilitated conversations around data allow for trust to develop among the various parties—teachers, administrators and parents—and it is the probing analysis of that data for root causes and possible solutions that develops “buy-in” and a take responsibility attitude among those charged with educating children. All members of the school community—teachers, parents, students, and administrators—must participate in the assessment of the data and agree on the emergent School Profile that describes conditions at the school and identifies the root causes of the conditions that most influence student achievement. A key message for the entire school team is that this process is not about assigning responsibility for past results; it is about taking ownership for future outcomes.

Engaging the full school community builds trust, increases the accuracy of the data causal analysis, engages the critical constituencies in finding solutions, and holds them responsible for implementing change and improvement strategies. Furthermore, addressing the root causes, which have been identified by members of the school community, becomes the basis for setting school priorities for improving student achievement. As *The Turnaround Challenge* suggests, this creates a “teaching culture that stresses collaboration and continuous improvement”.

The use of SLOs and ongoing formative assessment also fosters a data-driven culture where examining student work helps clarify where learning disconnects have occurred. This is encouraged not as a scheduled event, reserved for planning periods, but instead as an ongoing way to do the business of teaching. Checking in with students regularly about understanding, measuring progress toward goals, asking about their thinking processes when they chose the wrong answer or responded to the question not asked – all provide evidence to support the continuation or modification of programs or instructional strategies.

IV.B.4: III.A.6

Establish a school environment that improves school safety and discipline and addresses other non-academic factors that impact student achievement, such as students’ social, emotional, and health needs.

School effectiveness studies have consistently shown that high quality instructional programs provided by an engaged, motivated staff only succeed when a positive and supportive school environment also exists (Bryk et al., 2010, Purkey and Smith, 1983; Vishner, et al., 1999). A core tenet of CTAC’s turnaround work is that positive change must be systemic and sustainable, reaching into all aspects of school culture. To reach that goal requires a broad-based foundation of supports to be in place and implemented effectively and consistently by all staff members.

As a part of our work with the school team, we assess the current school environment through the survey data, observation of staff and student interactions, transitions, routines, operations and a review of discipline and suspension data. CTAC and the site-based team collaborate to examine these data using root cause analysis. The goal is to determine what is working well and what must be changed and most importantly, why. This provides the team with a framework to identify solutions that will fundamentally change the school environment.

CTAC works with the schools to create a Climate Support Team (CST) comprised of staff within the school. The purpose of the CST is to establish organization and structure for continual improvement of the school environment. A starting point for this team is a review of the research describing factors

III.A.6 Continued (Establish a school environment that improves school safety and discipline and addresses other non-academic factors that impact student achievement.)

that influence school climate. Many studies identify high levels of student engagement, the perception of a welcoming, safe environment, and high expectations for students contribute to a positive climate, which in turn leads to greater success for students. The CST focuses on those areas identified by the root cause analysis that will have the most impact based on the local context.

It is important that some form of positive behavior support system be in place. The specific program selected is less important than the commitment by the staff, without exception, to implement it consistently throughout the school. Student successes are celebrated, building a cycle of success that reinforces the type of student behavior most desired.

Students enter school every day with a wide-range of needs and issues, if they are not addressed, disruption of the learning environment is the result. This is where proactive staff members who recognize the change in a student's demeanor intervene before a situation escalates. It is the positive relationships between staff and students and trust that has been built overtime that allows for this type of intervention.

In successful schools, the policies, procedures and boundaries are clear, honored and supported by the entire school community. Students know what is expected of them in every classroom and facility on campus. The development of positive relationships leads to the development of a culture of shared beliefs, trust, and respect. As this positive culture is systematically and proactively built, school safety and discipline will improve and the focus of students, staff and parents/guardians can remain on learning.

However, a successful school requires the active participation community-based resources as well as school-based resources. CTAC has more than 30 years experience providing technical assistance to more than 220 agencies, including educational institutions, community-based organizations and coalitions. In addition to educational institutions, CTAC has worked closely with human services agencies which provide preventive and interventional models of service delivery in the areas of substance abuse, HIV/AIDS, domestic violence, housing, employment, parenting, adult education and cultural adjustment. Populations CTAC has worked with range from young Southeast Asian refugees to African American elders to Latino immigrant workers and students united to improve conditions at their schools.

CTAC's work has included a focus on community development issues such as neighborhood-initiated economic development projects, accessibility of services for the disabled, multi-racial housing coalitions and other projects directly concerned with strengthening low-income communities. CTAC particularly engages with communities that are disenfranchised, facing high poverty rates and barriers or challenges that have limited their access to mainstream avenues of support.

To ensure that staff and students have the support needed to be ready to learn, CTAC provides technical assistance through on-site assessment, training, mentoring and support for existing community-based programs. CTAC's on-site work is designed to:

1. Increase the sustainability of community-based programs, recognizing the fact that addressing the complexity of challenges addressing today's students requires a well-organized effort, working with school and community leadership to:
 - Assess organizational capacity
 - Identify existing community-based programs and resources designed to assist students and linking them to appropriate sites
 - Identify organizational development needs and address critical weaknesses
 - Assess the usefulness of existing supports and identify barriers and challenges
 - Put together an incremental and workable plan for ongoing capacity-building efforts

III.A.6 Continued (Establish a school environment that improves school safety and discipline and addresses other non-academic factors that impact student achievement.)

2. Increase the impact of the schools as centers for community change by developing, maintaining and enhancing co-curricular activities/interventions and creating effective supports for students by:
 - Expanding and diversifying community involvement and leadership
 - Utilizing data and other sources of information efficiently in decision making
 - Analyzing situations, factors and causes at the student, teacher and administrator levels
 - Examining best practices and considering a range of alternative strategies for implementation given cost, time and feasibility limitations
 - Identifying and analyzing collaborative partnerships, determining when and how to best invest time and resources.
 - Balancing multiple strategies for maximum impact, while staying true to the needs, principles and procedures established by the schools and their partners
 - Building monitoring and evaluation processes into organizational practices to measure progress and effectiveness as well as to provide recommendations for improvement in practices

CTAC has extensive experience navigating the complex structures associated with both the educational system and community agencies in multiple states and cities. As a result, CTAC has garnered considerable capacity to work with diverse groups on the public and private side, identifying and coordinating existing resources and programs available to help students and their community. CTAC staff members use their expertise to employ strategies proven to be successful to mesh the practices and policies of agencies with varying agendas. We have a long history of working with school districts and students on the difficult choices that they must make from desegregation work in Cambridge, Massachusetts, the development of a model for Youth Leadership, and continuing today across a variety of districts and agencies.

CTAC provides technical assistance to community groups in the form of coaching, training, information sharing, problem solving and/or consultation. In community development, CTAC administers initiatives that develop leadership and build organizational capacity in community-based organizations. Assistance focuses on planning, governance, effective initiatives and programming, membership development, collaboration, program evaluation, and resource development.

To ensure that schools and their partners who deliver services to youth gain maximum benefit and impact from the technical assistance, CTAC develops an overall technical assistance plan. A technical assistance plan is a means for identifying and addressing core issues—e.g., dropout, attendance, substance abuse, and child abuse—important to the school, partner organizations and the community by engaging all parties involved in the success of each student.

This plan is constructed in partnership with the members of the social service organizations, school staff, school leadership, community members, as well as students and parents when appropriate. To inform the plan, CTAC assists the involved parties in conducting an assessment of existing capacities and goals and works together with staff to set priorities. CTAC staff members facilitate and contribute to discussions and decision-making, centering on the real issues facing the school and their partners and the types of technical assistance activities required to address such issues.

The technical assistance plan will identify:

- Areas of strength, assets, human capital as well as needed changes and strategies for improvement;
- An incremental and workable plan for ongoing capacity-building efforts;
- Technical assistance needs: training needs: staff development; policy development;

III.A.6 Continued (Establish a school environment that improves school safety and discipline and addresses other non-academic factors that impact student achievement.)

- Organizational adjustments and changes that are needed to respond to the demands of the students, teachers and parents in a climate of limited resources;
- Resources and support systems/networks; assess the usefulness of those supports, and identify barriers or challenges for access;
- Strategies for evaluations designed to assess program effectiveness;
- Ways to improve, strengthen, change, develop or adjust existing organizational practices, goals and objectives in order to enhance student and school performance.

A substantial body of research links family and community involvement programs to student achievement and other indicators of school success. Serving as a critical component, technical assistance has been proven to enhance and strengthen such partnership program development. Data from research conducted in schools in the National Network of Partnership Schools shows that ongoing technical assistance related to youth support partnerships helped schools improve the number and quality of actions taken to organize their programs on family and community involvement. Improvement was seen from one year to the next, regardless of the quality of the programs in the prior school year (Epstein, 2005).

Support for the community-based programs is ongoing through on-site work as well as regular phone and web-based communication. The focus is on building relationships of trust and transparency to help ensure continued progress and readily available assistance when the agency encounters challenges or evaluation results indicate needed changes.

IV.B.4: III.A.7

Provide ongoing opportunities for family and community engagement.

Educators are increasingly aware of the importance of involving parents in the education of their children. This view is supported by countless research reports which demonstrate how parental encouragement and assistance contribute to students' higher achievement, better attitudes, and higher aspirations. This is true across socioeconomic, racial/ethnic, and educational backgrounds for students of all ages.ⁱⁱⁱ

State and federal mandates pave the way for powerful parent involvement. For example, Title I makes clear the type, degree, and extent of parent involvement expected. It specifies a full partnership with the school and includes participation on advisory committees and, as appropriate, in school decision making to ensure that parents assist in the education of their children.

According to Joyce Epstein, the Director of the Center on Families, Communities, Schools, and Children's learning at Johns Hopkins University, "There is no topic in education on which there is greater agreement than the need for parent involvement. Everyone wants more and better involvement, but most educators need help in how to develop productive programs of school-family-community partnerships" (2005). Epstein developed a six-step framework for parent involvement which has become the standard for the field and appears in various adaptations throughout research in this area. The six steps of the framework are parenting, communicating, volunteering, learning at home, decision making, and collaborating. These steps do not simply happen; they must be designed and implemented as part of an ongoing partnership. The framework includes sample practices and activities, potential challenges, and expected results of improved parental involvement.

IV.B.4: III.A.7 Continued (Provide ongoing opportunities for family and community engagement.)

Reported Causes of Low Parent Involvement

If we know parents matter in the education of our students, why then aren't all schools filled with parents involved in meaningful ways? CTAC assists schools as they seek answers to this question and search for ways to expand parental engagement. First, we recognize that the responsibility for improving parent involvement involves the administrator, the staff, and the parents. We have found the area of school planning that principals express the most concern about is parent involvement in school improvement—not because principals do not welcome involvement, but because they feel parents cannot or do not want to be involved. When parents are involved, the principal may observe that participation levels are limited or inconsistent. As a result, principals and staff members stop asking for parental engagement, and the few parents who are interested give more and more time. An unintended side effect is parents may feel they have tacit approval not to be involved.

While many schools have found ways to have a productive and fruitful relationship with parents to reach student and school goals, more often this is not the case. Some believe parents are unrealistic in their expectations of the school, are not interested in what is happening with their children and hold little value in education. Parents however, maintain they are interested in their children's education but do not feel welcome in their school or have issues with the personal attitudes of school personnel and the individual styles of those who lead their schools. Parents often identify three major barriers that prevent them from becoming involved: time and life demands, lack of clarity on what is expected of them and in what specific ways they can help their child at home, and various factors in the school environment. Clearly, perceptions about low parental engagement vary according to viewpoint. In the SBS process, we explore these causes, real or perceived, for low levels of parental involvement and effectively plan to improve or eliminate the problem.

CTAC and its SBS process seek to help schools with the issue of parent involvement by offering four tiered levels of involvement. For example, Tier 1 may see parents checking homework and making sure children are on time with necessary supplies. Tier 2 may include being a chaperone on field trips, participating in fundraisers and joining the Parent Teacher Organization (PTO). In Tier 3, parents are attending PTO meetings regularly and volunteering in classrooms. And, at Tier 4, parents are acting as tutors or as decision makers on the school planning team.

For SBS purposes, parents may be engaged at all levels, but most importantly at Tier 4, working with the school in making critical decisions about school improvements. Parents bring valuable perspectives to the table as members of the school planning team overseeing the Standard Bearer process. They understand their children's needs and are aware of the community's perceptions, values, and beliefs. While not usually educators, they bring their years of experience in other professions and aspects of life to the process. Authentic parent involvement is not just paper documented. It is more than having a seat at the table or fulfilling a request from the school. Actively involved parents work inside the SBS process, working cooperatively with staff and administration to develop a plan of action for the school. The benefits of their engagement are multi-fold. Parents feel empowered. They have a stronger sense of ownership in the education of their children, and a greater sense of satisfaction with the school.

Specifically, in SBS, parents at all levels are encouraged to complete the Organizational Assessment Survey (OAS), a Tier 1 activity. Next, parents on the school planning committee should be trained and become active in reviewing the results of the OAS and assisting in following the Ten Step Process along with school personnel to determine specific school issues, their causal factors and the ensuing strategies for correction and improvement. This continues until the planning is

IV.B.4: III.A.7 Continued (Provide ongoing opportunities for family and community engagement.)

complete and a new plan is ready for implementation. Likewise, parents take pride in noting the school's favorable accomplishments and strengths brought out during the analysis and overall planning for the school.

CTAC views ways to improve parent involvement falling into five broad categories:

- establish parent involvement as a school priority;
- improve the school's climate so it is more inviting to parents;
- improve communication (both written and oral and through social media) with parents;
- take proactive steps to involve parents ("reaching out"); and,
- provide administrative support for parent involvement.

Further, good schools see parents as assets and follow established patterns to involve parents. To begin to turn around low parent involvement, CTAC suggests the following:

- *Secure administrator and staff agreement that an all out effort will be given to improve parent involvement and a plan will be produced.* Make this a school priority for all staff and include parent representation on the school team to develop the plan.
- *Consider how the school is defining or characterizing parental involvement.* What is meant by parent? Sometimes extended family members or a guardian are more available or helpful than a parent. Similarly, what is meant by involvement? It may mean something as simple as reading with the child or providing a place and time for the child to complete homework. Or, it could be linking school work with everyday activities such as calculating grocery prices or reading a map, in addition to our traditional concepts of participation in the PTO or volunteering at the school.
- *Be clear about the school's expectation of parents.* Parents may not know that they are not meeting the school's expectations of them and their child. Take advantage of various forms of communication about what parents can do to help, with consideration of the languages and cultures represented at the school.
- *Determine what school staff view as the most critical parental involvement activities and events and communicate them early and repeatedly.* Create a calendar of key event dates and share them with parents. Many parents need advance notice to arrange time off from jobs and difficult schedules.
- *Make parents feel welcomed on campus.* Those who are at the point of first contact, such as secretaries, security and custodial staff, benefit from client service training. Rules for responding to phone calls and returning messages, and greeting visitors should be established and followed by all staff, as appropriate.
- *Create opportunities to meet parents at the school as well as on their own turf—in faith-based facilities, in large workplaces, in community based conference rooms or in libraries.*
- *Consider establishing a parent center or club and other ideas that may surface in staff or training meetings.* Further embrace parents who are in the school for specific purposes such as Booster Clubs.
- *Implement the parental involvement plan.* This requires the participation of effective school leadership, effective classroom teaching, and supportive parents. Monitor progress and make mid-year corrections as necessary. Share best practices and report progress to all.
- *Conduct an evaluation.* As the plans for improved parent involvement are implemented and certainly at the end of the school year. Just as we review performance indicators for success in student achievement, the team must look for growth in parental engagement all along the way.

Summary

The Community Training and Assistance Center is uniquely positioned to serve as a Lead Turnaround Partner to address the needs of consistently low-performing schools in Virginia. We have years of experience implementing our Standard Bearer Schools process in schools across the nation, resulting in dramatic improvements in student achievement. Our SBS process is data-driven, based on collaborative exploration into the causes of and solutions for obstacles to student learning, with a focus on the core academic areas. But the SBS process is broader than that: we seek answers to questions about low performance in the classroom and the school as well as its surrounding community. We are accustomed to coordinating work with community-based programs designed to assist schools with the chronic problems of drop-out, lack of parental involvement, and unique populations that do not have the support needed to succeed. The Standard Bearer Schools process is a holistic and sustainable solution for addressing the challenges of turnaround schools.

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ATTACHMENT B

Required Tables for “LTP Excluding Management” Option

Included with original copy of proposal.

References

IV.B.6

List at least three (3) references for which the same or similar services for the option(s) proposed were provided to include contact name, address, phone number and a description of the services provided and the time period services were performed.

1. U. S. Department of Education (Dates of service: September 2010—present)
CTAC provides technical assistance to the Race to the Top States and to USED on educator evaluation systems, including measuring student growth in non-tested grades and subjects, and Student Learning Objectives.
 - a. Brad Jupp, Special Assistant to U.S. Secretary of Education Arne Duncan
Leader of the Denver Design Team (former)
U.S. Department of Education, LBJ Building
400 Maryland Ave, SW, Washington, DC 20202
(202) 260-1465, brad.jupp@ed.gov

2. Charlotte-Mecklenburg Schools, North Carolina (Dates of service: July 2007—June 2012)
CTAC served as technical counsel, project evaluator and fiscal agent for the Teacher Incentive Fund-supported Leadership for Educators' Advanced Performance (TIF-LEAP), which used SLOs to measure student growth in both the tested and non-tested grades and subject areas.
 - a. Peter Gorman, Superintendent (former)
1155 Avenue of the Americas, New York, NY 10036
(212) 852-7230, PGorman@newscorp.com
 - b. Trent Merchant, Board of Education Member and Liaison to TIF-LEAP
6726 Brookmeade Drive, Charlotte, NC 28226
(704) 377-0362, tmerchant@gmail.com
 - c. Anne Clark, Deputy Superintendent
P.O. Box 30035, Charlotte, NC 28230
(980) 343-1173, a.clark@cms.k12.nc.us

3. Lowell Public Schools, Massachusetts (Dates of service: June 2010—present)
CTAC began working with the Charlotte M. Murkland Elementary School to implement the Standard Bearer Schools (SBS) improvement model. Six additional schools are now engaged in the SBS process directly, and district support to all leaders and schools is being organized around attention to root causes.
 - a. Jean Franco, Superintendent
43 Highland Street, Lowell, MA 01852
(978) 674-4324, jfranco@lowell.k12.ma.us

IV.B.6 Continued

List at least three (3) references for which the same or similar services for the option(s) proposed were provided to include contact name, address, phone number and a description of the services provided and the time period services were performed.

4. Decatur Public Schools, Illinois (Dates of service: March 2007—June 2010)
CTAC conducted an assessment of readiness and capacity and then implemented the Standard Bearer Schools process, providing data analysis, technical assistance and training to five schools.
 - a. Gloria Davis, Superintendent
101 W. Cerro Gordo Street, Decatur, IL 62523
(217) 424-3010, GJDavis@dps61.org

5. Duval County Public Schools, Florida (Dates of service: January 2006—June 2008)
CTAC performed an assessment and evaluation of district readiness and capacity and then provided training and technical assistance to twenty-seven schools in the implementation of our Standard Bearer Schools process to link school, student and teacher learning needs, causes, school actions and initiatives.
 - a. Joseph Wise, Superintendent of Duval County Public Schools (former)
Co-Founder and Chief Education Officer, Atlantic Research Partners (current)
17 North State Street, Suite 1890, Chicago, Illinois, 60602
(877) 740-7240, jw@atlanticresearchpartners.org

6. Christina School District, Delaware (Dates of service: August 2003—July 2006)
CTAC conducted an assessment and evaluation of district readiness and capacity to undertake system-wide reform effort. CTAC also provided technical assistance based on our Standard Bearer Schools framework to create sustained improvements in student achievement, strategic management and policy, leadership, human resource development and management, and stakeholder satisfaction and ownership.
 - a. Joseph Wise, Superintendent of Christina School District (former)
Co-Founder and Chief Education Officer, Atlantic Research Partners (current)
17 North State Street, Suite 1890, Chicago, Illinois, 60602
(877) 740-7240, jw@atlanticresearchpartners.org

ATTACHMENT E

Virginia State Corporation Commission (SCC) registration information

Included with original copy of proposal.

ATTACHMENT F

Pricing Schedule

Included with original copy of proposal.