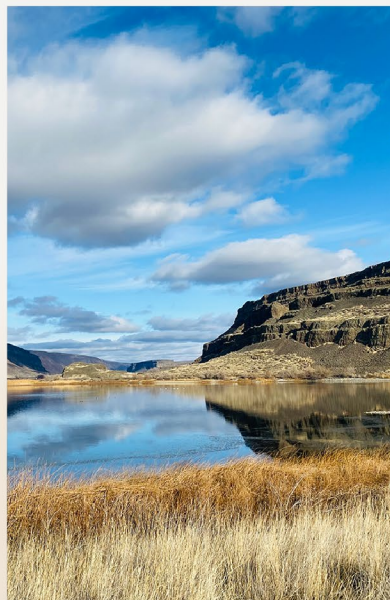




NORC Proposal

21st Century Community Learning Centers (21st CCLC) Program Quality and Technical Assistance No. 2025-30



Photography by William J. Visnius

**State of Washington,
Office of Superintendent of Public Instruction
Olympia, Washington
#2025-30
Due: July 10, 2025, 3:00pm PT**

Presented to
Josie Horn, RFP Coordinator
600 Washington Street South
P.O. Box 47200
Olympia, WA 98504-7200
contracts@k12.wa.us

NORC PD No. 2025.311

Presented by
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1. Letter of Submittal



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July 10, 2025

State of Washington
Office of Superintendent of Public Instruction
600 Washington Street South
PO Box 47200
Olympia, WA 98504
Attn: Josie Horn, RFP Coordinator
Email: contracts@k12.wa.us

Subject: RFP No. 2025-30
RFP Name: 21st CCLC Program Quality and Technical Assistance
NORC Proposal Number: 2025.311
NORC FEIN/TIN No. 36-2167808

Dear Ms. Horn:

National Opinion Research Center (NORC) is pleased to provide the following Fixed Price proposal in response to the referenced solicitation for "21st CCLC Program Quality " to The Washington State Office of Superintendent of Public Instruction.

This proposal is predicated on the terms and conditions of this solicitation. If NORC is awarded an agreement pursuant to this solicitation, NORC intends to provide the services as described within our proposal. Our proposal discusses our proposed team and their qualifications for providing expertise required to successfully execute the project. If NORC is selected for award as a result of this submission, we intend to enter into good faith contract negotiations to provide the services as described within our proposal.

We trust you will find our proposal to be comprehensive and complete. Our offer shall remain valid for a period of 90 days from the proposal due date. Should you have any questions regarding this proposal please contact Joy Zacharia via email at Zacharia-joy@norc.org. As Senior Vice President of NORC's Education and Child Development Department, I am authorized to negotiate and execute contracts on behalf of NORC.

We thank you for the opportunity to be a part of this important project.

Sincerely,



Jennifer Hamilton
Senior Vice President, Education & Child Development
646-644-6457 | Hamilton-jennifer@norc.org



Exhibit A: Certifications and Assurances

CERTIFICATIONS AND ASSURANCES

Bidder must sign and include the full text of this Exhibit A with their proposal.

Bidder makes the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. Bidder declares that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, Bidder may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of ninety (90) business days following receipt, and it may be accepted by OSPI without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the ninety (90) business-day period.
4. In preparing this proposal, Bidder has not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
5. Bidder understands that OSPI will not reimburse Bidder for any costs incurred in the preparation of this proposal. All proposals become the property of OSPI, and Bidder claims no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by Bidder prior to opening, directly or indirectly, to any other Bidder or to any competitor.
7. Bidder agrees that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, Bidder has described those exceptions in detail on the Contract Issues Exhibit.
8. No attempt has been made or will be made by the Bidder to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
9. Bidder grants OSPI the right to contact references and others, who may have pertinent information regarding the Bidder's prior experience and ability to perform the services contemplated in this procurement.

CERTIFICATIONS AND ASSURANCES

10. Bidder acknowledges that if awarded a contract with OSPI, Bidder is required to comply with all applicable state and federal civil rights and other laws. Failure to comply may result in Contract termination. Bidder agrees to submit additional information about its nondiscrimination policies, at any time, if requested by OSPI.
11. Bidder certifies that Bidder has not, within the three-year period immediately preceding the date of release of this competitive solicitation, been determined by a final and binding citation and notice of assessment issued by the Department of Labor and Industries or through a civil judgment to have willfully violated state minimum wage laws (RCW 49.38.082; Chapters 49.46 RCW, 49.48 RCW, or 49.52 RCW).
12. Bidder has not been debarred or otherwise restricted from participating in any public contracts.
13. Bidder certifies that Bidder has not willfully violated Washington State's wage payment laws within the last three years.
14. Bidder acknowledges its obligation to notify OSPI of any changes in the certifications and assurances above.

I certify under penalty of perjury of the laws of the State of Washington that the foregoing is true and correct.

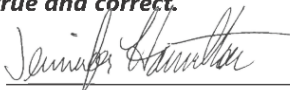
	7/10/2025	Chicago, IL
Signature of Bidder	Date	Place Signed (City, State)
Jennifer Hamilton	Senior Vice President	National Opinion Research Center
Printed Name	Title	Organization Name

Exhibit B: Qualification Affirmations

QUALIFICATION AFFIRMATIONS

CONSULTANT INFORMATION	
Bidder:	National Opinion Research Center

MINIMUM QUALIFICATIONS
<i>Please check all boxes that apply.</i> ☒ Licensed to do business in the State of Washington. If not licensed, provide a written intent to become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Contractor. ☒ Expertise in event logistics: Proven track record in planning, organizing, and executing events, including securing venues, coordinating food and audiovisual equipment, managing event schedules, acquiring day of support, and contracts for speakers. ☒ 21st CCLC program quality experience: Knowledge and experience in implementing and sustaining high-quality 21st Century Community Learning Centers (21st CCLC) programs, including familiarity with Quality Improvement Systems (QIS) and capacity building trainings. ☒ Evidence-Based Practices: Experience in implementing evidence-based practices and strategies that have been proven to be effective in out-of-school time programs. ☒ Compliance with Federal and State Regulations: Bidders must be knowledgeable about and comply with all relevant federal and state regulations, including those specific to the 21st CCLC program. ☒ Collaboration and partnership building: The ability to collaborate with schools, community organizations, and other stakeholders is crucial. This includes experience in building and maintaining partnerships. ☒ Facilitation skills: Ability to facilitate group discussions, training sessions, and workshops, ensuring active participation and engagement from all attendees. ☒ Organizational leadership: Strong leadership skills with the ability to manage teams, set goals, and ensure the successful completion of projects. ☒ Demonstrated capacity to successfully manage comprehensive projects, including successful management of budget, personnel, resources, and subcontractors if appropriate. Consultants who do not meet the minimum qualifications noted above will be rejected as non-responsive and will not receive further consideration. Any proposal that is rejected as non-responsive will not be evaluated or scored.

ADDITIONAL DESIRED QUALIFICATIONS
<i>Please check all boxes that apply.</i> ☒ Demonstrate strong leadership skills: demonstrate the ability to lead and motivate a team, set clear goals, and ensure that everyone is working towards the same objectives. ☒ Excellent communication skills: be able to communicate effectively with team members, stakeholders, and clients, ensuring that everyone is informed and on the same page. ☒ Demonstrated time management: ensuring that deadlines are met and that the project stays on schedule.

QUALIFICATION AFFIRMATIONS

- ☒ Experience managing project budgets effectively, ensuring that the project is completed within the allocated budget.
- ☒ Experience with project management tools: bidders should be familiar with and proficient in using project management tools and software to plan, track, and manage the project.
- ☒ Demonstrate a proven track record of successfully managing similar projects.

I certify under penalty of perjury of the laws of the State of Washington that the foregoing is true and correct.



7/10/2025

Chiaco, IL

Signature of Bidder

Date

Place Signed (City, State)

Jennifer Hamilton

Senior Vice President

National Opinion Research Center

Printed Name

Title

Organization Name

2. Technical Proposal

Land Acknowledgment

NORC at the University of Chicago acknowledges that our headquarters sit on the traditional homelands of the Council of the Three Fires: the Ojibwe, Odawa, and Potawatomi Nations. We also recognize that this 21st Century Community Learning Centers proposal will serve students and families across Washington State, which encompasses the traditional territories of numerous Indigenous peoples.

We acknowledge the traditional lands of our Washington-based team: the Squaxin Island Tribe, S'klallam Peoples, Cowlitz Indian Tribe, the Interior Salish T'sillian Band, Spokane Tribe, Cayuse, Umatilla, Walla Walla, and Yakama Tribes.

We honor the sovereignty of Washington's 29 federally recognized tribes and non-recognized tribes and acknowledge their continuing connection to these lands, waters, and communities. As we work to strengthen out-of-school time programming across Washington State, we commit to learning from Indigenous knowledge systems, supporting tribal educational priorities, and ensuring that 21st CCLC programs serving Native American students are culturally responsive and community-driven.

We recognize that true partnership requires ongoing relationship-building, cultural humility, and a commitment to supporting tribal self-determination in education.

Introduction

Washington's 21st Century Community Learning Centers (21st CCLC) operate within a complex and dynamic statewide ecosystem that requires serving students across rural and urban communities, navigating diverse needs, shifting policy requirements, and mitigating persistent opportunity gaps. Through its Quality Improvement System (QIS), The Office of the Superintendent for Public Instruction (OSPI) has made substantial progress in strengthening out-of-school time programming. OSPI has also identified the need for continued support to ensure fidelity of implementation, accelerate data-informed practices, and build durable local capacity across the state.

To meet these needs, NORC at the University of Chicago (NORC) will serve as the lead contractor for this work. Founded in 1941, NORC is an independent, nonpartisan social research organization known for its expertise in evaluation, data analysis, and technical assistance. NORC brings decades of experience managing federal and state education projects, with a strong track record of helping state education agencies, local education agencies, and other groups build sustainable systems that meet compliance requirements while improving outcomes.

The NORC team has expertise supporting 21st CCLC Quality Improvement System (QIS) frameworks across multiple states. NORC has helped local programs align with state QIS frameworks and federal expectations by providing rigorous evaluation, actionable insights, and customized professional development. This proposal, however, goes beyond relying solely on national experience. NORC has assembled a highly capable team of Washington-based consultants and subject matter experts, who have worked directly with OSPI and 21st CCLC programs in the state for over a decade. This includes former 21st CCLC program directors and program evaluators, Educational Service District (ESD) instructional leaders, coaching and professional learning specialists, curriculum developers, and technical assistance providers with deep regional experience in data use, compliance, and youth development. These professionals are already familiar with OSPI's systems, the Advisory Committee structure, grantee expectations, and regional service realities. This team is prepared to begin work on day one, leveraging existing relationships and deep contextual knowledge to deliver responsive, high-quality support that reflects Washington's vision and values.

The structure proposed here integrates a national infrastructure with local expertise. NORC will provide the operational backbone, evaluation strategy, and quality assurance, while the Washington-based team will direct implementation, facilitate coaching, lead training, coordinate regional efforts, and ensure daily responsiveness. This ensures that support remains grounded in Washington's educational landscape while also adhering to the best national practices in Quality Improvement Systems (QIS) and continuous improvement.

NORC's rich expertise, experience, and deep capacity are the foundation of our strategy for delivering consistent technical assistance, strengthening workforce development,

integrating real-time data for improvement, building scalable infrastructure, and ensuring credibility and reliability across all service components. Table 1 provides an overview of how our proposed approach aligns with the needs of OPSI and its interest holders. We describe how this partnership between OPSI, NORC, and the Washington-based team offers unique value in meeting OPSI's priorities. Each element is grounded in past performance and aligned with what OPSI's 21st CCLC system requires to realize improvements and succeed in its next phase of capacity building.

Table 1. NORC's Approach to Partnering with OPSI and its Interest Holders

Approach	The NORC Advantage	Key Benefits
Regional Integration with Local Leadership	NORC's model embeds statewide coordination with regional expertise using the current Advisory Council supplemented with local coaches and community-based collaborators	- Provides trusted regional coaches to ensure local context is honored within a consistent QIS framework - Improves site-level engagement and responsiveness through local coaching - Supports equity of access to new 21st CCLC programs in OPSI's targeted underserved counties - Establishes durable infrastructure with Washington-based experts
Data-Informed Decision-Making at Every Level	NORC will build a centralized QIS dashboard that integrates SEL PQA scores, student growth indicators, coaching logs, accountability measures, and feedback loops	- Delivers data-use coaching to inform Quality Improvement Plans (QIPs) - Offers quarterly dashboards that track fidelity, PD uptake by site and role, outcomes, and continuous improvement - Increases grantee accountability and transparency through evidence-based implementation - Enables OPSI to intervene and adapt based on timely performance insights
Workforce Development and Leadership Advancement	NORC incorporates formal leadership development pathways and career ladders for OST professionals	- Provides access to EART (External Assessor Reliability Training), TOT (Training of Trainers), and Summer Institute - Offers site-level mentoring, coaching, and staff pairing to develop leadership capacity - Articulates clear OST-to-K12 educational career pathways - Strengthens retention and succession planning within the OST workforce
Scalable and Sustainable Infrastructure	NORC supports long-term system durability through reusable training tools, local coach	- Utilizes pdEnroller platform and custom database for professional learning and site accountability - Facilitates statewide Advisory engagement, annual convenings, and event coordination

Approach	The NORC Advantage	Key Benefits
	pipelines, and a QIS implementation calendar	- Centralizes logistics while supporting regional delivery, reducing duplication and inefficiency - Aligns with OSPI goals to ensure sustainability beyond the contract period
Proven Expertise and Reliability	The NORC team is nationally recognized with extensive experience supporting federal and state quality initiatives in OST	- Brings decades of evaluation and TA experience with 21st CCLC programs across multiple states - Demonstrates expertise in navigating ESSA, ESEA, and other compliance frameworks - Demonstrated success in delivering actionable insights for sustainability and continuous improvement - Maintains strong internal controls, dedicated program management oversight, and responsive communication with OSPI

Project Approach/Methodology

Anchored by the development of the Quality Improvement System (QIS), the Washington 21st Century Community Learning Centers (21st CCLC) network has undergone significant evolution under OSPI's leadership. The current model reflects years of investment in professional development, continuous improvement cycles, and collaborative engagement among grantees. This proposal honors those efforts while offering strategic and sustainable enhancements that respond to system-level needs such as expanded capacity, improved coherence, and greater impact on scale. Our approach combines national expertise with in-depth local knowledge, ensuring fidelity to OSPI's existing model while building a durable and future-ready infrastructure.

A Dual Structure for Local Impact and Statewide Accountability

NORC will serve as the primary contractor, providing national infrastructure, rigorous research, and strategic guidance based on decades of leadership in evaluation, technical assistance, and compliance monitoring. However, the operational work of coaching, technical assistance, and professional learning will be led by a women-owned small business and a cadre of highly skilled consultants based in Washington State. This team includes experienced coaches, former 21st CCLC directors, data analysts, youth development leaders, and a curriculum specialist, who have worked in afterschool systems throughout the state. These individuals bring deep knowledge of Washington's geographic diversity, regional priorities, and local implementation challenges. This dual structure ensures OSPI benefits from NORC's proven systems while receiving day-to-day assistance from professionals embedded in Washington's education ecosystem.

In addition to support services, we are offering to build a cultural architecture to create a statewide learning community. We aim to create a powerful model for utilizing the collective knowledge, wisdom, expertise, and experience of OSPI leadership and the

network of 21st CCLC programs to move from disconnected compliance to shared stewardship and collective leadership. We will align programs, grantee support, SEA partnership, and system-wide learning to create maximum impact.

Strategic Focus and Theory of Action

The theory of action begins with the partnership between OSPI and a nationally experienced, locally responsive team led by NORC. In that case, 21st CCLC programs across Washington will receive coordinated, high-quality technical assistance, coaching, and professional development aligned with both state priorities and site-specific needs. By equipping program directors, site managers, and frontline staff with the necessary tools, data systems, leadership development pathways, and personalized support, OSPI will foster a culture of continuous improvement that elevates program quality, supports professional advancement, and improves student outcomes.

Our approach and methodology are evidence-informed and structured for durability, responsiveness, and measurable impact, positioning OSPI to lead one of the most effective statewide afterschool systems in the nation.

Our implementation strategy is built on these mutually reinforcing pillars:

- **Localized Coaching and Technical Assistance:** A distributed network of coaches will support grantees at the local and regional level, delivering hands-on QIS implementation assistance. These coaches will work in tandem with subject matter experts (SMEs) in youth development, evaluation, and social-emotional learning to provide targeted technical assistance. Support will be personalized, aligned to QIS expectations, and continuously informed by real-time data and site feedback.
- **Communities of Learning and Improvement:** Two powerful, research-based frameworks, the Six Team Conditions (Wageman & Hackman, 2005) and the Five Conditions of Collective Impact (Kania & Kramer, 2011), will be used to create a culture of shared purpose, continuous learning, and authentic connection across Washington's 21st Century Community Learning Centers. These frameworks are adapted for the scale and scope of this work, forming the core conditions needed to transition from fragmented compliance to vibrant, community-led stewardship of the program's vision. The Six Team Conditions framework will serve as the backbone for this approach, applying it not just to individual teams, but to the collective system as a whole. The result is a culture of collective wisdom, shared stewardship, and joyful engaged participation—a community people want to be part of because it helps them thrive.
- **Ongoing Communication that is Structured, Relational, and Reflective:** To sustain a sense of community and movement, the project team will build a dynamic communication system that is structured (defines clear roles and processes), relational (fosters sustainable relationships, peer-to-peer learning, and a culture of connection and reciprocity), and reflective (gives members of the 21st CCLC community opportunities to share success stories, ponder reflective questions, and evaluate and adapt program based on feedback and experiences). These elements

will work together in monthly meetings to enhance understanding and effectiveness of communication among site participants. The communication system will also include an Advisory Council led feedback loop that will shape agendas and help OSPI and grantees identify impacts. This communication strategy supports the culture created by stewardship and shared impact created through the communities of learning and improvement and ensures fidelity of implementation and compliance.

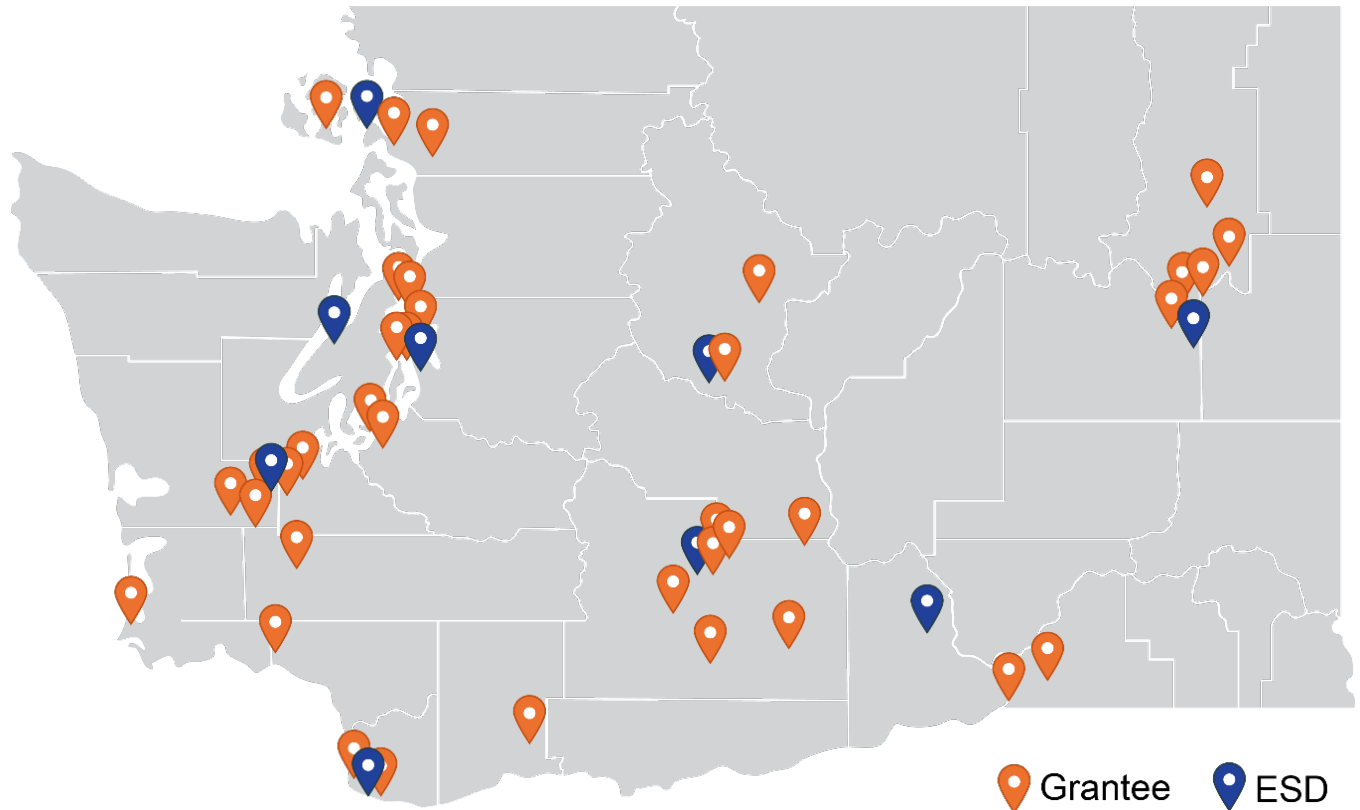
- **Data-Informed Infrastructure:** NORC will manage a centralized QIS dashboard that integrates performance indicators, coaching feedback, SEL PQA results, and training participation. This infrastructure enables OSPI to monitor fidelity, identify trends, and guide resource allocation. Data-informed TA cycles will drive transparency and ensure accountability across all levels of implementation.
- **Scalable and Sustainable Delivery Systems:** The Capital Region ESD 113 will provide support in the use of pdEnroller, Washington's statewide platform for professional development registration and tracking. Events tagged with #21stCCLC will be visible to grantees, ensuring streamlined access while allowing OSPI to monitor participation and generate trend analyses. pdEnroller's integration with Smartsheets will enable dashboards, support compliance, and provide reporting on staff engagement and training milestones. This statewide system eliminates duplication, reduces administrative burden, and ensures scalable delivery of professional learning and coaching resources.
- **Workforce Development and Leadership Pathways:** The model embeds professional growth and leadership development into QIS implementation. Program staff will engage in coaching, mentoring, and structured advancement pathways, including opportunities for external credentials and career mobility within the OST and K-12 systems. These strategies will strengthen staff retention, enhance coaching fidelity, and contribute to a more stable and skilled workforce capable of sustaining program quality over time.

Washington's nine Educational Service Districts (ESDs) offer critical infrastructure to ensure local and regional alignment with statewide initiatives. ESDs play a crucial role in delivering regional support, reducing duplication, and maximizing public investment. They operate as trusted intermediaries between OSPI, local districts, and schools, and have historically leveraged millions of dollars in resources for the benefit of students. They bring strong assets to this work, including professional development systems, instructional coaching networks, school improvement initiatives, and family support services.

Washington State has many school districts in communities that are economically depressed and resource deprived. Most of them are located in rural areas of the state where residents' families have resided for generations. They are close-knit, traditional, and cautious with outsiders. Since ESDs have long existing relationships across Washington's 39 counties they are the perfect collaborators for this project. They will be able to reach out, share opportunities, and provide necessary resources, especially in OSPI's priority regions (those with few or no 21st CCLC programs) and tribal-serving schools to ensure the communities can take advantage of out-of-school programming.

Working across all 39 counties and nine regions, the ESDs will help make the QIS more effective, more efficient, and more sustainable (see Figure 1 to see the geographic distribution of current grantees and ESDs across the State of Washington).

Figure 1. Geographic Distribution of Current Grantees and ESDs Across the State of Washington.



Washington ESDs will be supportive in another way as well. By aligning local and regional coaches with ESD networks, the proposed project ensures that professional learning reflects community context while maintaining consistency across the state. Coaches will work with Washington-based subject matter experts (SMEs) and OSPI to implement planning protocols, conduct fidelity reviews, and document progress toward site-specific Quality Improvement Plans (QIPs).

Finally, Modeling Sustainability from Day One is a focus of our approach which is designed for long-term viability. Rather than relying solely on external consultants or temporary interventions, the system builds permanent capacity through:

- Reusable and modular training resources.
- Career advancement pathways for staff and site leaders.
- Technology platforms that track, report, and align professional learning activities.
- Embedded data systems that support site and state-level continuous improvement.

As a result, grantees will not only improve in real time but will also gain the tools and capabilities needed to sustain high-quality programming beyond the life of this contract. Over time, this model fosters local ownership, cultivates statewide leadership, and supports the evolution of an efficient, effective, and sustainable 21st CCLC system aligned to OSPI's vision.

Expected outcomes of this implementation are that program staff will (1) demonstrate significantly improved application of QIS practices, (2) utilize performance data effectively to inform programmatic decisions, and (3) actively engage in professional learning communities that enhance knowledge and skills and offer new career paths. Furthermore, programs will improve as measured by SEL PQA and other tools. At the state level, OSPI will gain a responsive, self-sustaining QIS infrastructure supported by Washington-based leadership, purpose-built tools, and a culture of accountability and improvement.

QIS Logic Model

To translate this strategy into measurable action, our team has developed a comprehensive Logic Model that maps the full scope of the Washington State 21st CCLC Quality Improvement System (QIS). The Logic Model shown in Table 2 serves as an implementation blueprint that aligns key inputs with activities, outputs, and both short to long-term outcomes. It functions as a dynamic management tool to ensure fidelity to OSPI's vision while allowing for real-time responsiveness to evolving site-level needs. This approach promotes transparency, facilitates coordinated oversight, and enhances accountability throughout every phase of the project.

Grounded in the NORC team's national technical assistance experience and tailored to Washington's operational context, the Logic Model illustrates how evidence-based activities, including coaching, training, data integration, and leadership development, produce sustainable improvements. The model's alignment with federal guidelines and OSPI's strategic goals ensures that each element contributes meaningfully to grantee performance, student outcomes, and system durability. It also reinforces the project's emphasis on equitable implementation, scalable support, and long-term workforce capacity. This model offers a clear roadmap that guides both daily operations and cumulative impact.

Table 2. NORC OSPI QIS Logic Model

Inputs	Activities	Outputs	Outcomes		
			Short	Medium	Long
NORC national leadership and Washington-state based project team	Conduct expert analysis of current TA system components; gather grantee voices for sentiment; facilitate the design of an efficient, effective, sustainable learning ecosystem; launch 21 st CCLC career certifications	Connection to a statewide movement for quality	Increased adoption of QIS practices by site staff	Grantees consistently implementing QIPs based on growth indicators	Systemic academic and SEL gains across student populations
Coaches (reliable raters, TOT/F grads)	Provide regional coaching and fidelity monitoring; build awareness of 21 st CCLC in schools that ESD staff already have a relationship with; collaborate to deliver high quality family learning series especially to small rural schools	Robust QIPs submitted and assessments conducted at each site; facilitation of family learning series	High training satisfaction; improved QIS compliance; more proposals submitted by schools in underserved counties; daytime teachers increased awareness of 21 st CCLC and alignment	Integration of youth, family, and staff input into QIS cycles; daytime teachers collaboratively work with 21 st CCLC staff to improve daytime and afterschool alignment; increased engagement of families in events; increased student achievement	Sustainable and scalable QIS infrastructure led by WA-based experts; seamless collaboration between daytime and 21 st CCLC staff for alignment

Inputs	Activities	Outputs	Outcomes		
			Short	Medium	Long
Community-based organizations (CBOs), consultants, and SMEs in SEL and youth development	Deliver core training sessions, including Planning with Data, Basics SEL PQA, EART, Leadership Practice Series, and capacity-building workshops	Monthly and quarterly TA and performance reports	Use of SEL PQA tools and dashboards by grantees	Demonstrated improvement in skill application by program leaders and staff	Career advancement for site staff and directors within the education sector
OSPI oversight, Advisory guidance, and QIS implementation guidance	Facilitate the Advisory Council to boost 21 st CCLC learning ecosystem; facilitate analysis and interpretation of curated data	Advisory meeting minutes; plans for implementation of decisions; site fidelity rubrics	Clearer vision and pathways to improve QIS implementation; renewed and reinvigorated leadership	Emergence of local leadership and improved coaching fidelity	Institutionalization of high-quality TA and PD cycles across regions
Comprehensive data collection including focus groups, collective impact baseline, SEL PQA, QIS plans, student growth analytics, post event surveys, post coaching surveys, pdEnroller grantee registration and completion, etc.	Invite grantees for focus groups, collective impact baseline efforts; develop robust feedback loop; develop fidelity rubrics; develop QIS dashboard to display curated data	Advisory meeting minutes and grantee feedback analysis	Increased awareness of data tools and site-level accountability practices	Consistent use of data to refine program quality and identify staff professional learning needs	Improved program fidelity and data use capacity across all regions

Inputs	Activities	Outputs	Outcomes		
			Short	Medium	Long
Leadership development frameworks, mentoring tools, and educator career pathway models	Facilitate mentoring, coaching, and targeted PD for aspiring site leaders	Documented career development plans, mentoring sessions logged, PD milestones achieved	Established site leader and staff development goals aligned with educational career pathways	Program staff begin progression along articulated career ladders within their organizations	Strengthened educational workforce pipeline from OST programs to K-12 leadership roles
Career pathway frameworks, leadership competencies, mentorship models, and PD tracking tools	Design and implement structured leadership development activities for program directors and staff, including mentorship pairing, targeted coaching, and credentialing opportunities	Career pathway plans completed, mentorship logs, leadership training milestones, and participation records	Increased understanding of leadership competencies and career opportunities among program staff	Staff participate in formal leadership development pathways and demonstrate progression in skills and responsibilities	Developed a statewide career ladder that supports the retention and advancement of OST professionals into leadership roles

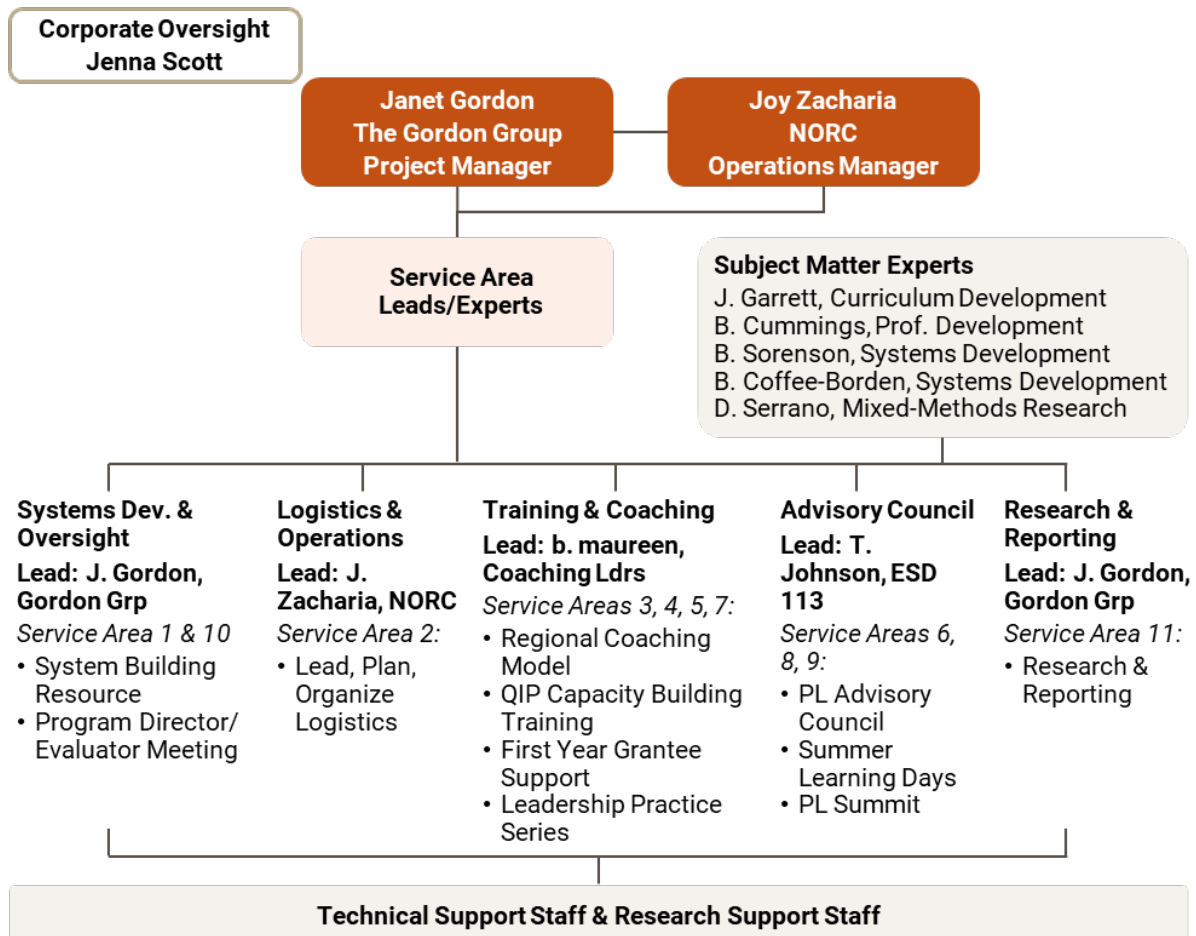
Inputs	Activities	Outputs	Outcomes		
			Short	Medium	Long
pdEnroller Professional Development Platform supported by Capital Region ESD 113	Streamline registration and tracking for all QIS events; monitor real-time participation; automate certificate generation; collect post-event evaluations; manage resource sharing and access; integrate with Smartsheet for dashboard reporting	Real-time participation dashboards by site, role, and event; automated compliance reports; comprehensive feedback summaries with trend analysis; digital certificates and professional development transcripts; resource libraries accessible statewide	95%+ grantee registration and participation in mandatory training; improved accessibility across geographic regions; immediate feedback enabling rapid training improvements; enhanced visibility into participation gaps	Integrated participation data with QIS performance tracking; site-level improvement correlations; reduced administrative burden enabling focus on quality; evidence-based program adjustments	Self-sustaining professional development infrastructure; comprehensive career pathway documentation; reduced barriers to OST professional advancement; replicable model for statewide QIS implementation

Scope of Work

The Scope of Work (SOW) is organized into eleven distinct service areas. They are (1) System Building Resource; (2) Lead, Plan, Organize Logistics; (3) Regional Coaching Model; (4) Leadership Practice Series; (5) Quality Improvement System and Capacity Building Training; (6) Professional Learning Advisory Committee; (7) Support for First Year Grantees; (8) Summer Learning Days; (9) Professional Learning Summits; (10) Program Director/Evaluator Meetings; and (11) Research and Reporting. Each area represents a core component of the overall scope of the project. These service areas collectively encompass all proposed deliverables and activities, ensuring comprehensive coverage of the project requirements. Each section clearly outlines the specific tasks and outcomes associated with the respective service, highlights the key personnel responsible for delivery, and defines the roles and contributions of both the NORC team and our Washington-based team. This structure is designed to provide clarity, accountability, and alignment with the client's goals throughout the life of the project.

Figure 2 provides the organizational structure of the team and illustrates the collaborative framework through which we will deliver this work.

Figure 2. Organizational Structure



Our team—comprised of NORC at the University of Chicago (NORC), The Gordon Group, and additional expert consultants—includes **nationally recognized leaders with deep connections** to OSPI and decades of collective experience in systems development, coaching, continuous quality improvement, research and evaluation. Our team brings a long-standing commitment to supporting federal and state-funded education programs, with specific and sustained expertise in the 21st Century Community Learning Centers (21st CCLC) initiative.

Dr. Janet Gordon of The Gordon Group will be the dedicated project manager who will lead and manage the project. In this role, Dr. Gordon will contribute at least 20 hours per week to the project and will be responsible for communicating deliverables and assigning duties to other expert consultants. In addition to project manager, Dr. Gordon will lead the Systems Development and Oversight Service Area which consists of the System Building Resource and the Program Director/Evaluation Meeting Tasks. She will also lead the Research and Reporting Service Area (Service Area 11). With over 30 years of experience in evaluation and strategic planning of education and technical assistance programs, Dr. Gordon is a recognized expert in performance management, continuous improvement, and stakeholder engagement. She has worked extensively with federal and regional partners—including in Washington State—to lead the design and implementation of systems that drive measurable impact in education and youth development.

NORC will serve as the backbone for operations management which will be led by **Joy Zacharia**, Senior Research Director II at NORC. As Operations Manager, Ms. Zacharia will lead, plan and organize all project-related Logistics and Operations (Service Area 2). Ms. Zacharia has over 30 years of experience directing educational research and large-scale evaluations across early childhood, K-12, and post-secondary education systems. Her expertise spans both qualitative and quantitative methods, project and relationship management, and the provision of technical assistance to build local capacity. Ms. Zacharia has led the evaluations of multiple 21st CCLC projects throughout the country and has directed a five-year federal full-service community school evaluation in Vancouver, Washington.

Jenna Scott, PhD, Vice President of Education & Child Development at NORC, will provide corporate oversight. Dr. Scott brings over 20 years of experience leading technical assistance projects and evaluations for federal, state, and private-sector clients. A trained mixed-methods sociologist, she specializes in culturally responsive evaluation and capacity-building frameworks, addressing key issues such as educator quality, school improvement, college readiness, human capital systems, and equity-informed strategic planning. She presently is working with the state of Maryland on its strategic plan for education, including OST programs and initiatives. Dr. Scott will donate her time to the project.

bob maureen of Coaching Leaders is a Washington-based expert consultant who will oversee the Training and Coaching Service Area which includes the Regional Coaching Model, QIP Capacity Building Training, First Year Grantee Support, and the

Leadership Practice Series (Service Areas 3, 4, 5, and 7). With a long-standing career rooted in the 21st CCLC system, she has supported statewide and local program improvement efforts in the State of Washington and across the country. A Certified Professional Coach, she specializes in leadership development, quality improvement systems, and compliance coaching. She is known for helping individuals and teams build the capacity for sustainable change through strategic coaching and training.

Dr. Todd Johnson, a nationally respected evaluator with over 20 years of experience in educational systems research, longitudinal design, and quality improvement, is a Washington-based expert consultant who will lead the Advisory Council Service Area. This Service Area includes the development and implementation of the professional learning advisory council, summer learning days, and the professional learning summit (Service Areas 6, 8, and 9). Dr. Johnson has led more than 30 federally and state-funded evaluations and supported the development of performance dashboards, site-level feedback systems, and regional coaching infrastructure to foster continuous improvement.

Subject Matter Experts (SME) will collaborate with Service Area leads throughout the project period. These Washington-based consultants (**Dr. Joyce Garrett, Brent Cummings, and Bernie Sorenson**) have expertise in OST systems as well as in the areas of systems development, professional development and curriculum development. NORC SMEs, **Dr. Brandon Coffee-Borden** and **Dr. Diana Serrano** will also be available to support this work. Dr. Brandon Coffee-Borden is a systems development expert and Dr. Diana Serrano is an expert in mixed-method evaluation. Dr. Serrano brings practical classroom experience to her evaluation of education and OST programs. For additional details on the proposed staffing structure and the management of the project, please refer to the **Management Proposal**.

Service 1: System Building Resource

Management and Communication

Dr. Janet Gordon will serve as the dedicated Project Manager, committing no fewer than 20 hours per week to lead implementation, manage communications with OSPI, oversee fiscal operations, and coordinate interagency deliverables. She will meet with OSPI monthly or as needed to promote strong management and consistent communication of the effort. These monthly meetings will provide a forum to (1) review key milestones, deliverables, accomplishments and breakthroughs in building the state system; (2) identify potential risks and agree on mitigation plans; (3) obtain feedback on the future direction of the work and clarify expectations and preferences; and (4) create an open space for dialogue and collaboration regarding the overall QIS design and implementation. She will be joined, in these meetings, by additional team members determined by the topics to be discussed. Between meetings, she will maintain regular contact with OSPI via phone and email.

Dr. Gordon will work closely with NORC's Operations Manager, Joy Zacharia, to delegate duties and assign project staff to ensure the timely completion of key activities. Together, they will base decisions on the need to work within available resources and maintain the high levels of quality needed to support the statewide improvement process. Dr. Gordon will also coordinate with Ms. Zacharia to manage the project budget and allocate resources. Ms. Zacharia will work closely with a NORC financial analyst to track actual expenditures and maintain financial accuracy and control through monthly reviews of the project's financial status to evaluate the project's progress relative to available resources. Dr. Gordon and Ms. Zacharia will meet weekly initially and bi-weekly after the first two months to review project progress and expenditures and will collaborate in the development of a quarterly progress memo.

Quality Improvement System Design and Implementation

The objective of this contract is to assist OSPI in implementing and sustaining high-quality 21st CCLC out-of-school and extended learning time centers through implementing a Quality Improvement System (QIS) and providing ongoing technical assistance, program implementation support, and capacity building training for grantees. The NORC team will develop a structured framework focused on enhancing processes and outcomes to foster a culture of continuous improvement. This framework will serve as the backbone of OSPI's quality assurance efforts.

Design: The design of the QIS includes specific, measurable objectives aligned with the overall state and federal goals for 21st CCLC programs. The NORC team has put policies and practices in place that address (1) document control; (2) data management; (3) professional development; (4) event planning and implementation; (5) capacity building and quality improvement training; and (6) research and reporting. Each of these design elements is described in detail below (see Services 1 through 11).

Implementation: As project manager, Dr. Gordon will lead the development of the 21st CCLC annual program activity calendar working closely with the Operations Manager, Ms. Zacharia, to plan and confirm event dates by August 1st of each project year. Ms. Zacharia will also have responsibility for creating the document control strategy, customizing the data management system; managing event logistics; and directing research and reporting activities. Ms. Zacharia and Dr. Gordon will coordinate with service area leads, subject matter experts, OSPI staff, ESD personnel, Advisory Council members, and site leaders to co-design events such as the Professional Learning Summit, Summer Learning Days, SEL PQA training, design coaching and mentoring training and experiences. Using the strategies outlined in Service Area 2 and collaborating closely with Dr. Gordon, Ms. Zacharia and her team will assist in securing all events by November 1st of each project year. The events calendar will be housed on a server approved by OSPI and updated regularly by the NORC team. A platform will also be identified to house data through a dashboard, data tracking system, and/or an events tracking system.

An in-person planning meeting will be scheduled at the onset of each project year to discuss and plan the activities and events for the year. Staff from OSPI, the Washington-based team, and NORC leadership will gather in a facilitated session to review curated data for informed decision making. Bernie Sorenson, the Washington-based Systems Development SME, will demonstrate two powerful, research-based frameworks to establish a foundation from which to build the cultural architecture for a statewide 21st CCLC learning community. Ms. Sorenson will help establish the core conditions needed to transition from fragmented compliance to vibrant, community-led stewardship of OSPI's 21st CCLC program vision. This meeting will serve as an opportunity to develop immediate plans for the coming year; reflect on opportunities to support the broader maintenance, growth, and sustainability of the state's Quality Improvement System; and establish short-and long-term goals to guide data collection and technical assistance.

This system-building process, including the recruitment of Advisory Committee members, creation of shared goals and expectations, and support of models for external assessor coaches and trainers, will be driven by structured engagement facilitated by Ms. Sorensen and bob maureen, the Training and Coaching Lead. Together they will work with regional consultants, SME, and ESDs instructional coaches, to develop grantee technical assistance, lead professional development, and support the Quality Improvement Learning Community (grantees).

A critical element of this effort is the creation and maintenance of a centralized site-level accountability database to monitor program participation, fidelity of implementation, and key performance metrics. We recognize that OSPI views monitoring and evaluation as an ongoing process to assess needs, inform action, capture impact, and support continuous learning and improvement. In recognition that grantees need specific information to inform their local efforts, we propose to develop and maintain an online, centralized site-level accountability database to monitor program participation, fidelity of implementation, and key performance metrics. This tool will allow OSPI to monitor implementation at the aggregate and site-level while allowing grantees to compare their program to other programs in the state (in aggregate or relevant clusters) and use this information for program improvement. Key indicators included in this system may include but not be limited to:

- Completion and maintenance of training to understand the SEL PQA domains and indicators and how to use the tool as part of a continuous quality improvement system.
- Monitoring participation by role and by school district in group and individualized coaching opportunities and other quality improvement activities.
- Scheduling and completion of baseline, mid-point, and post assessments and the associated results.
- Developing procedures to gather reliable data about current practices from multiple interest holders and identify strengths and areas for improvement.
- Development and completion of asset-based action plans which include realistic goals to improve program quality.

To support tracking of professional development selection, registration, and completion, the NORC team will work with OSPI to create tailored reports that align with OSPI's existing Smartsheets platform. For example, a report that displays grantee's planned registrations with district, school, name, and role and another that displays grantee's completed courses with the same demographic information. To the extent possible, this "Completed Courses" Smartsheet will be updated on an ongoing basis by connecting it with information obtained from pdEnroller.

Service 2: Lead, Plan, and Organize Logistics

The Operations Manager, Joy Zacharia, will lead all aspects of event planning and logistical coordination using a systems-oriented and service-focused approach that ensures consistent execution across all 21st CCLC convenings.

Managed by ESD 113, pdEnroller, a comprehensive event management system currently used by OSPI and the nine ESDs in Washington, will provide a secure online web interface that will be used to create and monitor event registration and attendance; provide a history of professional development activities; track professional development clock hours; and permit the download of course completion certificates. See Figure 3 for an example of the pdEnroller Homepage. pdEnroller also serves instructors as a mechanism for sharing resources, such as workshop/course materials and internet links, which remain available even after an event is concluded. A locking feature is available so that only registered participants can access materials for any specific event.

Most educators in the state already have an account with pdEnroller, but those who do not can easily create an account. Participants can access their participation history and download and print a certificate of attendance upon completion of a course. The instructors can access a permanent record of attendance. Event organizers can create a custom evaluation survey to be administered electronically at the completion of a course, and the organizers have access to timely evaluation data.

Figure 3. Example of pdEnroller Homepage

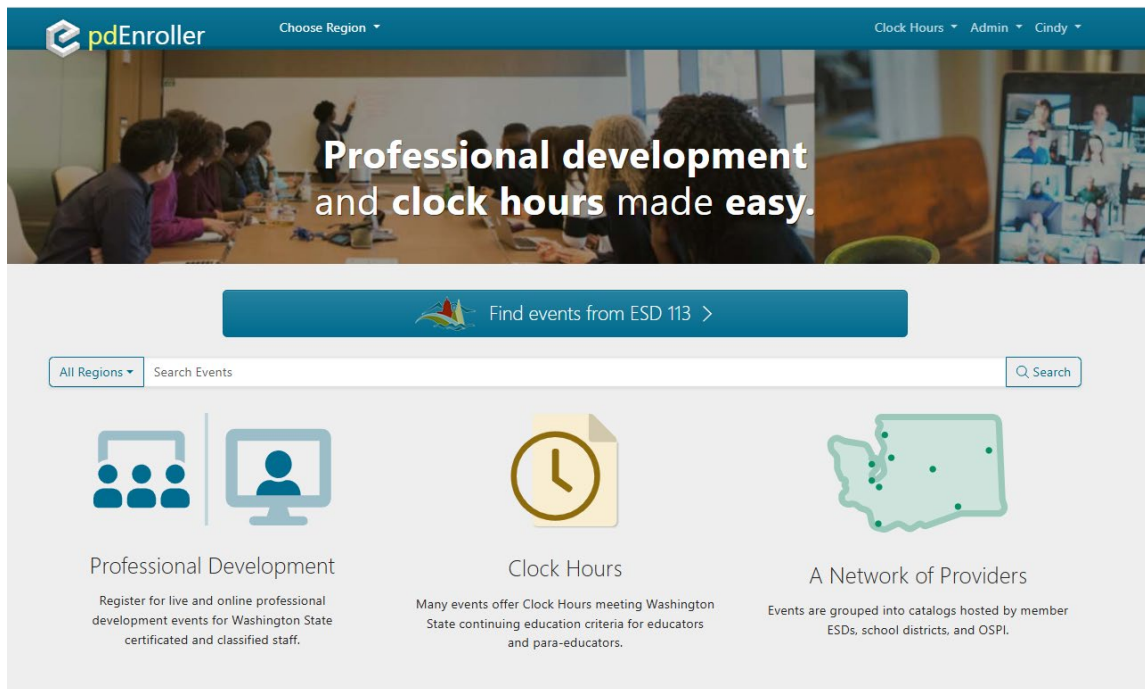


Figure 4 indicates how the catalog for pdEnroller is searchable and can be filtered to help participants find classes, workshops, and other events of interest.

Figure 4. Example of pdEnroller Search Feature

187 Found

>> [State-wide events](#)
[ESD 113](#)

☐ Online Only

☐ Upcoming Only

☐ Ongoing

Credits

☐ Clock Hours

☐ Equity

☐ Educational Leadership

☐ STEM

☐ FCS Hours

☐ English Language Learner

☐ Social Emotional Learning

☐ Clock Hours (Suicide Prevention)

Subjects

☐ Special Education

☐ Professional Development

☐ Behavior Management

☐ Professional Learning

☐ Skyward Student

☐ TPEP

Audiences

☐ Principal

☐ Paraeducator

☐ K-12 Teachers

☐ Assistant Principal

☐ All District Staff - School and Central Office

☐ Counselor

All Regions Search Title, Event Id, or Clock Hour # Search Calendar

#	Start	Title	Sponsor	Price	Status
#187768	Jun 20, 2025	Safety and Belonging for LGBTQ+ Youth During Turbulent Times 6 Clock Hours 6 Equity	NWESD	Free	Closed
#187183	Jun 20, 2025	Paraeducator Assessment Test (ETS ParaPro Assessment)	NCESD	\$75.00	Closed
#181836	Jun 21, 2025	School Bus Driver Instructor Inservice Class Region 2	ESD 112	\$110.00	Register
#172106 (SPV0073)	Jun 23, 2025	BEST Mentor Academy 101 Zoom 12 Clock Hours 2 Equity	OSPI	Free	Closed
#181219	Jun 23, 2025	Skyward SMS Student Year End Wizard - ESD123: On-Site Only ESD123 (On-Site Only)	ESD 112	Free	Closed
#171590	Jun 23, 2025	ESD 105 Multilingual Symposium Access for All: Empowering and Amplifying Student Voice 6 Clock Hours 6 English Language Learner 6 Social Emotional Learning 6 Equity 6 Educational Leadership	ESD 105	\$300.00	Closed
#185776 (SPV0088)	Jun 23, 2025	IN-PERSON BEST Mentor Academy 201 Vancouver 12 Clock Hours 12 Equity	OSPI	Free	Register
#185784 (VAN1087)	Jun 24, 2025	I.D.E.A.L. Science Method For the Elementary Classroom Teacher (STEM) 15 Clock Hours 15 STEM	Camas	\$165.00	Info
#181695	Jun 24, 2025	Skyward Student Food Service Year-End Process, SMS AM 3 Attendance Hours	ESD 113	Free	Register
#175463	Jun 24, 2025	Para Pro Assessment (ETS ParaPro) ESD 123	ESD 123	\$75.00	4 Seats Left

Meeting Logistics and Venues

The NORC team is well-situated to coordinate all logistics associated with in-person events. The team brings a unique combination of meeting planning and subject matter expertise spanning out-of-school time research, policies, and programs and is superbly equipped to set OSPI up for successful meetings. Ms. Zacharia, who will lead this effort, will coordinate all in-person logistics, including securing venues, arranging food and beverage services, confirming audiovisual needs, and assigning staff for event setup and closeout. In the following sections, we detail our approach to assisting OSPI with the planning, preparation, and execution of all pre-, day-of, and post-convening activities. This logistics model is designed to ensure that every convening, whether in-person or virtual, is timely, well-organized, and strategically aligned with the mission of the 21st CCLC program.

We have a history of successful meeting planning including all meeting logistics to ensure the following services are provided: meeting venue (including keynote room, breakout rooms, and similar spaces as needed); abstract submission platform; hotel accommodations; and virtual meeting platform, if needed. For virtual meetings meeting platform options will be proposed (such as Microsoft Teams and Zoom) for OSPI's consideration; and for in-person meeting options, venues that are readily accessible to transportation hubs will be proposed. The team will enter into a contract only with a hotel that is ADA compliant and aligns with Washington State's Office of Financial Management per diem rates to ensure cost control and accessibility.

Our team is well versed in documenting and tracking logistics and timelines for a wide range of state, federal, and regional events. For each event, an event task list will be maintained that includes all the activities needed to successfully complete an event. OSPI leadership or designated staff will be apprised monthly at a minimum about the progress on required tasks, unless OSPI leadership requests a different timeframe. The team will notify OSPI within two business days if unforeseen obstacles stall the delivery of the agreed-upon TA or deliveries associated with meetings logistics.

The following sections detail the team's approach to assisting OSPI with the planning, preparation, and execution of all pre-, day-of, and post-convening activities. This logistics model is designed to ensure that every convening, whether in-person or virtual, is timely, well-organized, and strategically aligned with the mission of the 21st Century Community Learning Centers (CCLC) program.

Development of Meeting Goals and Objectives and Staffing Plan

As meeting dates approach, our team will work closely with OSPI to understand the main objectives of each meeting and the level of support needed. Based on those discussions, the team will draft the initial agenda and supporting meeting materials for OSPI's review providing sufficient time to accommodate revisions and iterations. Agendas will align with the objectives and desired presentations for each meeting, and the team can provide additional support (e.g., development of discussion questions and

methods to facilitate engagement) as needed. A final meeting agenda will be delivered to OSPI no later than 6 weeks before the meeting.

Based on the agreed upon meeting structure and format, our team will develop a staffing plan using its robust infrastructure to augment staff resources during periods of high demand and as particular expertise is required. We will regularly engage a team of support staff as needed for meeting preparation, attendance, and post-meeting deliverables. All staff will be trained on the requirements of the contract, management processes, and standardized templates and will therefore be ready to support convening activities on short notice. Using this approach, we can rapidly scale support to align with OSPI's evolving needs.

Identification of Speakers and Presenters

In consultation with the OSPI, our team will develop an approved abstract submission process and will coordinate with OSPI to identify speakers of interest given the goals and desired outcomes of the meeting. The team will receive abstract submissions from interested presenters and review them for inclusion in the meeting using a standardized set of criteria such as those described below to be finalized in collaboration with OSPI.

- **Clarity of Purpose and Goals:** Purpose of the submission is exceptionally clear, focused, and well-defined.
- **Use of Evidence or Practice-Based Knowledge:** The submission shows strong integration of research evidence, data, or field-based best practices.
- **Innovation and Adaptability:** The submission provides a highly innovative approach, tool, or demonstrates exceptional adaptation to context or needs.
- **Impact on Partners and Institutions:** The submission has a clear and compelling demonstration of positive impact on systems, communities, or organizations.
- **Cultural and Contextual Responsiveness:** The submission explicitly addresses equity, inclusion, and cultural/contextual tailoring of TA or quality improvement practices.
- **Relevance to TA Practice:** The submission is strongly aligned with technical assistance, capacity building, or implementation support.
- **Potential for Learning or Replication:** The submission has strong potential for others to apply, adapt, or learn from the approach or model.

The team will submit the proposals received and review results for the consideration of OSPI and other OSPI-designated staff. The NORC team will work with OPSI to finalize the list of speakers and presenters. Upon OSPI approval, we will communicate the results of the proposal reviews to each applicant or invitee.

At least three months before the meeting, the team will secure agreements with all presenters and will coordinate with OSPI to assist with the development and finalization of any speaker or panelist preparation materials, such as annotated agendas, talking points for slides, suggestions for facilitation questions and time management,

facilitation best practice guides, run of show documentation, and sharing of slides or additional meeting preparation (e.g., dry runs) in advance of the convening. At least two months before the meeting, we will submit all draft presenter materials to OSPI for review and approval. At least two weeks before the meeting, we will submit final presenter material.

At OPSI's direction, the team will work with Tower Travel Management to facilitate presenters' travel needs. Air or rail travel for presenters will be booked in a timely manner in order to secure lower fares. In addition, all flights will be coach class and any air/rail tickets exceeding required rates will be submitted for OPSI approval prior to ticketing.

Participant Support and Communication

The NORC team will prepare an electronic Save-the-Date notifications with reminders for potential meeting participants in advance of the meeting with a link to registration information and will work with OSPI to develop a meeting program outlining agenda details and pertinent logistics for distribution to attendees. The team will maintain regular contact with meeting registrants and keep each apprised of their registration status and any pertinent changes, including individual needs, to maximize each person's ability to fully engage in the meeting. We will develop a participant list from pertinent information obtained from the registration website to be included in the meeting materials. At least two weeks prior to the meeting, the team will submit the final participant list to OSPI for review.

Development of Meeting Materials

As per protocol, our team will ensure that all potential presenters and all materials developed in connection with the meeting are OSPI-approved. At least two months prior to the meeting, all draft materials will be submitted to the OSPI for review and approval.

Our team will work with OSPI to identify exercises best suited to the structure and format of the meeting to help OSPI meet its objectives. For facilitated sessions, we will develop a detailed facilitation guide, which will include scripts, creative ice breakers, interactive tools, discussion questions, and descriptions of the different exercises. The facilitators will also conduct a dry run of the session to practice the technology transitions and finalize the details for the flow of the session, such as roles or timing. Any gaps in or changes to guides will be updated and shared with relevant staff.

We will utilize readability statistics to ensure all materials intended for external audiences use non-technical language when possible and read at a 7th grade reading level. Our team can make any document 508-compliant to ensure external documents are accessible to all audiences through our Desktop Publishing (DTP) service. At least two weeks prior to the meeting, we will submit final materials to the OSPI. Meeting materials will be disseminated as electronic files for virtual meetings. Electronic files and/or hard copies will be disseminated for hybrid and in-person meetings based on OSPI's

preferences. Following each meeting, we will provide the OSPI with all materials and discuss with OSPI which should be made publicly available for future participant use.

Day of Meeting Support

As noted above, the NORC team will work with the selected venue and local vendors as needed to arrange all appropriate and cost-effective audiovisual meeting equipment and technical support needs, including LCD equipment, Internet access, laptops for presenter and grantee use, flipcharts, microphones, and screens as well as all food and beverage arrangements.

We are well-equipped to continue providing day-of meeting support including notetaking, recording and transcription, real-time synthesis of key themes, ad hoc support for OSPI staff, and meeting facilitation using a cadre of team members. As described above the team will meet with OSPI to determine the goals and objectives of the meeting, the proposed structure for the meeting (i.e., number of presenters, number of breakout groups, and location), and the day-of meeting support needs.

Notetakers will use pre-existing templates tailored to the goals, objectives, and agenda of each meeting to take notes as they actively listen to presenters and stakeholder discussions, explicitly noting any emergent themes, points of debate, and all ideas or approaches suggested by stakeholders (novel or otherwise) during discussions that could inform future OSPI efforts.

Pulling from a deep bench of staff, the team can be available to provide real-time synthesis of key themes from stakeholder discussions and thought partnership with OSPI staff to inform meeting proceedings or next steps. During the session, staff will use structured, tailored templates to quickly capture the key themes focused on the meeting's goals and objectives. During breaks, the NORC team and the facilitators can quickly meet to develop consensus on the themes, and if needed, develop slides to present the themes in the subsequent sessions.

Post-meeting Reflection

Following each convening, the NORC team will coordinate with the notetakers to collate the meeting notes using a notes template formerly approved by OSPI and deliver the notes within 3 business days of the convening. The notes will focus on key decisions, action items, emergent themes, and areas requiring further clarification.

An initial summary report draft from each convening will be delivered to OSPI within 6 business days of the convening. Following receipt of OSPI edits and comments, a revised version will be delivered within 6 business days of receiving OSPI's feedback. These summary reports may be tailored to different audiences (internal vs. external) and may be considered thematic in nature, at the discretion of OSPI, but will include an overview of each presentation and a summary of any discussions, focusing primarily on key themes, major points of discussion, and action items or reminders. All meeting

deliverables will be thoroughly reviewed for accuracy and detail. As appropriate, we will develop brief summaries of stakeholder input that includes their suggestions or recommendations for OSPI, key themes or priority areas, and topics for further discussion to support ongoing development of the Quality Improvement System. This support allows OSPI to readily respond to stakeholders and inform meeting conclusions and next steps. The structure (e.g., newsletter, memo), content, and audience (e.g., OSPI staff and leadership) for these summaries will be discussed with OSPI ahead of time to ensure each one meets their needs and translates well. NORC will also analyze and report post-event assessment data as described further below.

Service 3: Regional Coaching Model

The Regional Coaching Model service will be led by bob maureen who is the CEO at Coaching Leaders, Corp and a consultant with the Weikart Center (WC). She is well regarded for the expertise she brings to the coaching model being proposed here.

In year 1, up to four regional coaches will be recruited from a cadre of reliable Program Quality Assessment (PQA) raters—graduates of the Youth Works Methods Training of Trainers (TOTs) and Social Emotional Learning Training of Facilitators. Coaches will work directly with new grantees, on site and virtually, to provide support for the implementation of QIS efforts including operationalizing the SEL PQA into their program. This new model will place coaches in many of the meetings and trainings with the 21st CCLC leader with whom they are partnered.

First year coaching is intended to help site leaders understand the QIS process and how to prepare for the self-assessment, facilitate the self-assessment process, use data to design an improvement plan, and how to support behavior change in their staffs. To accomplish the coaching process outlined here several activities will take place: (1) 21st CCLC staff and their coach will attend selected OSPI and project sponsored events together; (2) 21st CCLC site leaders will share learnings from events with their site team members; (3) coach will observe the site lead and team member conversations focused on the PQA/QIS, and (4) coach and site lead will debrief and reflect. The debrief/reflection session will use both structured and informal strategies to identify strengths (and growth based on any previous observations), assess challenges, and solve problems. First year grantees will receive between 10 and 17 hours of coaching.

The schedule in Table 3 below describes the Regional Coaching Model process in more detail.

Table 3. Schedule of Regional Coaching Model

	Delivered	Up To
Coaching sites	Virtual/Phone	2 hours/site/month
	In-Person	4 visits/site/year (up to 3 hrs./visit)
Attend & support sites	Kick off webinar	2 hrs.
	Basics	8 hrs.
	PWD	8 hrs.
Facilitate methods	Learning Symposium (Fall/Spring)	2 trainings
	Learning Symposium (Summer)	2 trainings
Attend	Dir/Eval Mtg	8 hrs.
	3 Advisory Council Mtgs	2
	Onboarding	2
	Training (TOTs, EART)	Dependent on location/need
	Coaches Learning Community	1 hour/month
	Support/Check ins	1 hour/month

Each coach will receive a stipend and technical support to ensure capacity for sustained engagement. They will be supported through core training sessions, access to standardized implementation protocols, and participation in a continuous Learning Community focused on reflective practice and peer exchange to ensure coaching is both strategic and data informed. The project staff advocates opening training events to a maximum of three staff from each of the nine Washington ESDs to increase capacity and foster sustainability by building a cadre of regional coaches. The goal is to build a group of reliable raters and TOT/F graduates to draw from in ensuing years. In future years, these trainings could be opened to participants in Alaska, Oregon, Idaho, and Montana to help offset costs and to build sustainability into the model.

Finally, both the NORC team and the Washington-based team know the importance of assessing the events and processes associated with this new model. The Washington-based team will work with bob maureen to review and select appropriate tools to assess both the quantity and quality of the coach-led interactions. It may be necessary to adapt or create one or more evidence-based tools to fit the specialized needs of this QIS coaching model.

Service 4: Leadership Practice Series

This service will also be led and guided by Bob Maureen of Coaching Leaders, Corp. Currently, the Leadership Practice Series is purchased from the Weichert Center (WC) and is offered as an off-the-shelf curriculum comprised of five virtual workshops targeted to 21st CCLC network leads, program directors, site coordinators, and program quality coordinators. The workshops include staff development, the social, emotional, and cognitive aspects of student learning, and strategies for leading out-of-school time programs. This content of this curriculum, however, is not always well-aligned with the needs of 21st CCLC leaders in Washington State. Furthermore, WC requires facilitation of the workshop series by its staff, who may not have deep knowledge of or experience in our local schools. Consequently, the NORC and Washington-based teams would like to propose the development of a customized curriculum designed specifically to meet the needs of Washington's 21st CCLC programs and facilitated by those with knowledge, skills, and dispositions gained as a result of their intensive involvement in local schools.

We know that many Washington programs do not have a large job pool, especially those in rural districts, and must hire early-career project directors or site coordinators who do not have much experience in program implementation. They need easy access to high quality, useful, and relevant learning content and mentors who can provide the knowledge, skills, and abilities needed to implement and manage a successful and joyful 21st CCLC. Custom workshops/modules will be able to address managerial gaps such as understanding the role of the project director, budgeting and finance, personnel management, change management, evaluation, cultural competence, and leading staff. Modules will be revised or created based on feedback from 21st CCLC program staff, OSPI, and project team members.

Based on what we know, we would also like to suggest an improvement in delivery, offering a module every week or every other week starting and ending before winter break. This 7-part series is especially relevant for leaders who want to strengthen their leadership skills by using a social, emotional, and cognitive learning lens to guide their teams through the continuous improvement process. If OSPI wants to continue the fall learning symposium, these workshops could be offered as a one-day session for project directors/site coordinators who have 2+ years of experience, in program years 3, 4, and 5. Encouraging this series to occur before winter break allows project directors and site coordinators to put structured routines and practices into place within the first 10 weeks of afterschool program.

Dr. Garrett, an expert in curriculum and instruction with deep knowledge of administration and 21st CCLC programs, will design the workshop/modules. She will utilize what we know about adult learning by (1) drawing upon the interests and motivations of adult learners; (2) ensuring content is relevant and practical; (3) providing opportunities for self-directed and experiential learning; (4) offering interactive exercises; and (5) including occasions for participants to engage with instructors, mentors, and peers. As the modules are created, Dr. Garrett will be mindful of the QIS

trainings offered through the WC. The workshops/modules will scaffold on that information and supplement rather than supplant that training.

The modules/workshops will be designed so they can be delivered virtually or in person. Virtual presentations will allow participants to interact with the materials at their own pace. They will include strategies and activities that foster the concepts of shared stewardship and collective impact. They will also provide links to on-line resources that allow for a deeper dive into the materials. The modules will include pre-assessments so the learner can identify their gaps in knowledge and personalize their learning goals and objectives. Focused questions will guide the learner, scaffolded content will promote the acquisition and retention of knowledge, and interactive exercises will provide immediate feedback. Lastly, an informal summative assessment will be designed to encourage and uplift participants' achievements toward their certificate of completion (i.e. 10 Skills of High-Performing Program Directors).

This new approach to leadership practice will also improve on the mentor/mentee model that was replicated in the last implementation of 21st CCLC programming. In that model, new site-level staff were paired with experienced site level staff to foster reciprocal mentoring and build leadership continuity across the network. While accurate in theory, producing a high-quality mentor/mentee experience takes expertise. Both NORC and the Washington-based team have expertise in producing high quality effective mentor/mentee experiences that attain desired outcomes. The approach proposed here, therefore, will continue to support the mentor/mentee model with an important distinction: it will include optimal matching of pairs with training and directed facilitation, provided by Systems Development SME, Ms. Sorenson, to ensure teams build strong mutual trust, practice the skills of open communication, and engage actively in the process. Research evidence strongly suggests that this approach leads to invigorated mentors, meaningful professional development of new leaders, and successful implementation of quality improvement strategies across sites.

Service 5: Quality Improvement System and Capacity Building Trainings

The Quality Improvement System and Capacity Building Trainings for the Quality Improvement Learning Community (QILC) will be led by bob maureen with oversight from the Project Manager, Dr. Gordon. The QILC, as required under Section A.4.ii of OSPI RFP No. 2025-30, acknowledges that grantee learning is ongoing through structured professional development and technical assistance. While distinct from monthly Director meetings, the QILC is designed to function in seamless alignment with data-informed instruction from OSPI and the Advisory. The NORC team brings expertise in evidence-based strategies to facilitate full participation of the QILC in offerings. Strategies include constant communication to grantees to mimic our hyper-linked society especially familiar to the younger generation of 21st CCLC leaders that we are fortunate to have in Washington State.

This communication plan includes regularly scheduled emails (monthly), short-form updates through a centralized digital bulletin, and targeted reminders for upcoming trainings and deliverables. Each message is concise, visually accessible, and action-oriented—typically under 250 words—highlighting what is new, what is required, and where to find additional support or resources. Correspondences are intentionally framed to be friendly, inclusive, and responsive to diverse learning and communication styles. They often feature embedded hyperlinks for quick access, clear subject lines, and segmented content to help grantees efficiently navigate information. This approach ensures ongoing engagement, promotes responsiveness, and reinforces alignment with the broader goals of continuous improvement across the QILC.

Table 4 provides a description of the structured professional development and technical assistance currently implemented. The second column outlines the opportunities and proposed improvements based on our first-hand experience. The proposed improvements will lead to the short- and medium-term outcomes listed in the right-hand column.

Table 4. Description of Professional Development and Technical Assistance

QIS & Capacity Building Virtual and On-Site Trainings	Opportunities & Proposed Improvements	Outcomes
Virtual Kick-Off Mtg	There is an opportunity to build a strong sense of shared purpose and stewardship; to motivate grantees to invest time to further their 21st CCLC career. The main difference this year is that coaches will be at the training courses, alongside the sites they are supporting. Some courses will be facilitated by the WC.	Compliance and quality improvement across the QIS. Attendance increases and broadens in events, training, and PD because staff can see the value. Coaches participating alongside site leads ensure they have a shared understanding of what is being explained throughout the core training.
SEL PQA Basics (what is tool, how to lead self/external assessment) (1 day training) Planning With Data (1 day training)	Coaches will check in with site leads during the implementation of part of the agenda to support them in the “take it back” process.	Site leads will walk away from training with “take it back” plans, including when their staff meetings will be and how they will engage the coach to support them through the process.

QIS & Capacity Building Virtual and On-Site Trainings	Opportunities & Proposed Improvements	Outcomes
EART (virtual)	Maintain accurate database of reliable raters across the state who are available to step in for site program evaluator when needed. Maintain communication with evaluators on status of their certification.	Reduced stress and frustration with QIS process means timely compliance to deadlines and higher quality implementation.

To maximize accessibility, the training model is structured to support both new and continuing grantees, using a hybrid format that integrates live virtual instruction with regionally facilitated in-person sessions. First, a virtual kick-off meeting will occur for each grant year. The kick-off meeting will welcome all grantees back from summer break and extend a warm welcome to new grantees. The members of the team will be introduced, and participants will be invited to add their name and school district in the chat. Ms. Sorenson, Systems Development SME, will set the stage using evidence-based strategies to develop the six conditions for effective teams¹ to improve cohesion, collective learning, and shared purpose. This theme will be threaded through in-person and virtual gatherings and communications to build shared responsibility and stewardship of Washington's 21st CCLC. Research literature suggests that trust-based stewardship is more effective for government agencies than control-based approaches².

In the kick-off meeting, grantees will learn how to access project staff, OSPI staff, ESD personnel, subject matter experts and other key people associated with the project for questions, information and resources including the comprehensive calendar of QIS capacity-building events regularly updated. They will learn about the offerings tailored specifically for program directors, site staff, and evaluators and certifications available. Each event will outline mandatory (e.g. Program director) and recommended (e.g., evaluator) attendees. To enhance functionality and ease of use, the calendar will be hosted on a shared Google Drive and supplemented by a dynamic, color-coded Google Calendar. This will allow grantees to subscribe and sync events directly to their personal calendars, receive real-time updates, and set personalized reminders. Each calendar entry will include key details such as session objectives, presenter names, registration links (via pdEnroller), and relevant resource attachments. The detailed agenda for the kick-off meeting will be co-developed by OSPI, the Advisory, and the Washington-based team.

¹ Wageman, R., Nunes, D. A., Burruss, J. A., & Hackman, J. R. (2008). Senior leadership teams: What it takes to make them great. Harvard Business Review Press.

² Schillemans, T., & Bjurström, K. H. (2020). Trust and verification: Balancing agency and stewardship theory in the governance of agencies. *International Public Management Journal*, 23(5), 650-676.

Further, by deploying a network of expert trainers for virtual delivery and certified local and regional facilitators for on-site delivery there can be simultaneous training across multiple sites. One main difference this year is that coaches will be at the training courses, alongside the sites they are supporting. Coaches participating alongside site leads ensure they have a shared understanding of what is being explained throughout the core training. EART training will be offered for new and returning external assessors. Improvements will include an accurate database of all reliable raters in the state. This will be made available for sites to search in the event they need an external assessor to meet the state deadline if their evaluator is not reliable at the time. Automatic reminder messages will be sent to reliable raters reminding them of when their certification expires with options of EART trainings offered.

Planning with Data training will be offered, to all grantees, supporting data-informed decision-making. Evaluators will be encouraged to attend. Regional and local training will be tailored to align with the quality standards for youth development. Ongoing support will be provided through virtual help sessions, coaching, and access to training materials and guidance documentation, ensuring the successful implementation of the 21st CCLC programs across the State.

The trainings (Table 4) will be structured to both inform and draw from themes identified through the QILC, creating feedback loops that ensure consistency, reinforce fidelity of implementation, and amplify innovation. Data will be collected from the QILC (grantees) after TA, training, and PD to create a responsive and iterative forum for grantees and coaches to engage in collaborative learning cycles to inform the strategic guidance from the Advisory discussions. The NORC team, subject matter experts, and consultants will carefully design the cadence, content, and facilitation strategies of QILC convenings to ensure coherence with the Advisory's priorities, evidence-informed improvement methods, and the Washington QIS domains, thereby maximizing synergy across all support structures provided to 21st CCLC grantees.

Service 6: Professional Learning Advisory Council

The Advisory Council will serve as a cornerstone of the technical assistance system supporting Washington's 21st CCLC Quality Improvement System (QIS). Developed in partnership OSPI, the Advisory Council will be collaboratively led by the Washington-based implementation team and include active engagement from regional coaches, subject matter experts (SMEs), and program leadership across the state.

Advisory Council members will be selected through a transparent recruitment process facilitated by the Washington-based team with operational support from NORC's Operations Manager, Ms. Zacharia and her team. The council will include up to twelve representatives from both current and former 21st CCLC grantees. This group will include site managers, program directors, technical assistance providers, and at least four certified trainers and coaches (e.g., reliable raters, TOT graduates). Their firsthand

knowledge of program implementation, professional learning, and coaching systems will provide essential insight into strengthening QIS fidelity across regions.

Each quarter, the Advisory Council will convene to review implementation data, discuss current challenges, and co-develop strategies to elevate professional learning effectiveness. Data sources, including SEL PQA results, pdEnroller training logs, coaching records, and Quality Improvement Plan (QIP) progress reports, will inform the meeting agenda and guide for responsive planning. Meetings will be co-facilitated by members of the Washington-based team, including SMEs and facilitators experienced in organizational learning, systems change, and youth development. OSPI will contribute to agenda co-design and serve as an active thought partner throughout each planning and facilitation cycle.

Between meetings, Advisory Council members will remain engaged through a consistent communications strategy that includes at least eight email updates per year. These visually engaging newsletters will include summaries of council activities, emerging themes, notable quotes, photos, action steps, and opportunities for feedback. This approach strengthens continuity and encourages shared accountability between formal convenings.

All logistics, including travel reimbursement, stipends, catering, space reservations, and materials preparation, will be fully managed by the Operations Manager, Ms. Zacharia in compliance with Washington’s Office of Financial Management (OFM) requirements. This comprehensive support infrastructure ensures that council members can focus on substance without administrative burden. To clarify roles and timelines, Table 5 summarizes the phased development, implementation, and support activities associated with the Advisory.

Table 5. The Advisory Council: Development, Implementation, and Support Overview

Phase	Key Activities	Lead	Timeline	Purpose
Development	Design transparent recruitment and selection process for up to 12 Advisory members	Washington-based team, NORC team	Month 1	Ensure diversity of voice and representation across current/former 21st CCLC grantees
	Distribute recruitment materials to sites and networks	Washington-based team	Month 1–2	Engage site-level leadership and secure broad grantee interest

Phase	Key Activities	Lead	Timeline	Purpose
	Finalize selection and notify members	NORC team	Month 2	Confirm participation and set expectations for the year ahead
Implementation	Facilitate quarterly Advisory meetings informed by real-time implementation data	Washington-based team and SMEs	Quarterly (Months 3, 6, 9, 12)	Establish annual goals, review QIS data, shape statewide PD and TA strategies
	Co-develop meeting agendas with OSPI and Advisory members	Advisory Coordinator	Prior to each meeting	Ensure meetings remain aligned with OSPI strategic priorities and grantee needs
	Engage SMEs, coaches, and advisors in meeting facilitation	Washington-based team	Quarterly	Provide technical content and relational engagement aligned to system needs
Ongoing Support	Manage all meeting logistics (venue, catering, materials, reimbursements, stipends)	NORC team	Ongoing	Ensure member engagement is supported without an administrative burden
	Produce and distribute eight visually appealing recap newsletters annually	Communications Liaison, NORC team	Every 4–6 weeks	Reinforce learning, share quotes/themes, gather feedback, and foster engagement between meetings
	Collect feedback and track Advisory influence on statewide implementation	Data Analyst, NORC team	Quarterly Review	Document impact and ensure strategic learning cycles across all OSPI 21st CCLC supports

Through this structured, yet responsive approach, the Advisory Council will strengthen the feedback loop between grantees, coaches, and OSPI, while anchoring professional learning strategies in real-world applications. By leveraging practitioner voices, regional

knowledge, and data-informed planning, the Advisory Council becomes not only a council but a catalyst for sustained improvement and innovation in the QIS framework.

Service 7: Support for First-Year Grantees

Support for first-year grantees will be led by a member of the Washington State team who has deep expertise in this area. Up to 10 first-year grantees will receive tailored on-site and virtual support from one of three experienced 21st CCLC coaches on our Washington state team. First-year grantees will be paired with the coach that best matches their needs and unique context. For example, schools in rural eastern Washington have very different challenges compared to urban schools in western Washington. A one-size-fits-all approach will not be used. New grantees will complete a brief survey to assess their knowledge, skills, abilities, and experience related to implementation of 21st CCLC programs. They will have the opportunity to identify gaps in their professional repertoire. Coaches of first-year grantees will be accountable for specific tasks to ensure high-quality interactions that are relevant and useful. For example, tasks will include (1) reading the grantee's 21st CCLC proposal to learn about their communities' assets and needs, and gain a full understanding of their project goals, objectives, activities, professional development plan, and evaluation plan; (2) reviewing the grantee survey of knowledge, skills, and abilities; and (3) developing an individual mentoring plan for the grantee.

Customized supports will be co-created with grantees. They will draw upon our team's expert knowledge, skills, and expertise grounded in decades of work in improvement science and program social sciences and education evaluation. Revision of supports to make them stronger will be based on feedback from grantees and team members. Furthermore, with assistance from our cultural experts, we can ensure first year supports include helping grantees provide culturally relevant programming for students and families. We can also provide guidance about culturally appropriate, research-based instruments for obtaining baseline measures and assessment positive impacts.

The **New Grantee Orientation** will bring a grantee's team and their coaches to a full day in-person event. The event will include a community building activity with SME Ms. Sorenson and content to move grantee's perceptions and expectations from "passive training delivery" to "actively building" a learning ecosystem together. It will build emotional trust among program directors, site coordinators, and coaches. Key members from the leadership team such as Dr. Gordon and bob maureen will be present to facilitate building relational trust and emphasizing that we are building highly skilled 21st CCLC professionals not just programs. We will use engagement strategies supplemented with a power point deck to highlight the QIS and take a deep dive into 21st CCLC grant deliverables using techniques that are fun and memorable. With OSPI's approval, this event could occur Day 1 before the Basics training on Day 2.

Each grantee will engage with their coach in the co-development of a detailed implementation plan that outlines instructional goals, compliance benchmarks, staffing

and scheduling structures, and a roadmap for continuous improvement. This plan will be grounded in both state expectations and the specific contexts of each local program. Existing tools, templates, and trainings will be used supplemented by NORC's evidence-based resources as approved by OSPI. Ongoing support will include monthly check-ins, access to resources, and alignment with regional learning cohorts to encourage peer exchange and sustained growth.

The first-year grantees will use pdEnroller to sign up for the coaching sessions on dates/times that each coach has pre-loaded into pdEnroller. pdEnroller offers functionality to collect user-provided information about the coaching desired and importantly, provide feedback about the quality, usefulness, and relevance of the experience post-coaching. These data are available in real-time to each Coach so they can modify and improve each session. Each month coaching reports from pdEnroller will be summarized for quantitative and qualitative metrics established in conjunction with OSPI.

Service 8: Summer Learning Days

The 21st CCLC Summer Institute is a cornerstone event in Washington's professional development calendar. It provides a timely opportunity for front-line staff, site leaders, and OSPI partners to engage in capacity-building activities that directly strengthen out-of-school time (OST) programming statewide. The NORC team, led by Ms. Zacharia, will provide project management, technical support, and logistical execution for the annual Summer Institute. At the same time, SME Brent Cummings will lead event design, workshop facilitation, and grantee coordination in close partnership with OSPI and the Advisory Council.

Brent Cummings brings a dynamic and practitioner-grounded approach to adult learning. His previous DO! Conferences have become widely respected for introducing project-based learning (PBL) strategies to direct service staff in an engaging, hands-on format. Under his leadership, the Summer Institute will evolve beyond a conventional workshop model to offer experiential learning opportunities that model responsive practices and elevate site-level capacity. Mr. Cummings will work collaboratively with the Advisory Council and OSPI staff to ensure the institute reflects real-world implementation needs and site-level feedback.

Planning for the 2025 Summer Institute will formally launch in September 2025, led by the NORC and the Washington-based teams. The process will begin with a targeted needs assessment to gather insights from grantees, regional coaches, and Advisory members. This data will inform the scope, session themes, and facilitator selection. To maintain OSPI's standards of accessibility and impact, approximately 100 participants, including site managers, direct service staff, and selected youth, will be invited to attend. The design process will prioritize responsiveness to statewide quality priorities, the integration of student voice, and the demonstration of equity-centered improvement strategies that promote sustainability.

A key improvement to the Institute involves elevating student voice. As part of Walla Walla School District's (WWSD) summer programming, a group of high school students will be invited to participate in selected sessions and provide direct input, establishing an example for future gatherings. Their feedback will help deepen adult understanding of youth perspectives and reinforce OSPI's vision for personalized and effective program environments.

Table 6 summarizes the current Summer Learning Days model, outlines proposed improvements, and highlights anticipated short- and medium-term outcomes.

Table 6. Summer Learning Days – Enhancements and Expected Outcomes

Summer Learning Days Activity	Opportunities and Proposed Improvements	Anticipated Outcomes
Annual event planned and implemented for approx. 100 21st CCLC staff and managers	Integrate "DO! Conference" elements for immersive PBL-focused sessions led by Brent Cummings	Increased staff confidence and competence in delivering project-based, engaging enrichment experiences
Four 2-hour workshops facilitated primarily by Program Directors	Expand workshop structure to include mixed-role facilitation (PDs, SMEs, youth) and make sessions more interactive and outcome-oriented	Stronger cross-role collaboration and improved transfer of training into practice
Planning conducted jointly with OSPI and Advisory	Conduct targeted needs assessment (Fall 2025) to guide session themes, facilitators, and formats; elevate Advisory input at all phases	More responsive and high-impact content aligned to program goals and statewide QIS strategies
OSPI-led logistics and informal coordination	NORC leads venue contracting, facilitator recruitment, travel coordination, event registration, and all reimbursements in alignment with OFM requirements	Seamless event execution, reduced OSPI administrative burden, and maximized participation
Formalize student participation	Invite student representatives from WWSD and other grantees to attend select sessions and share experiences and feedback	Student voice integrated into adult PD, enhancing relevance and relational connection to program implementation

Summer Learning Days Activity	Opportunities and Proposed Improvements	Anticipated Outcomes
Enhanced post-event follow-up	Develop and distribute session materials, digital toolkits, and a brief post-event evaluation; deliver summary reports to OSPI with implementation recommendations	Measurable change in staff practice and strengthened post-event continuity and application

Enhancing Summer Learning Days not only modernizes the event structure but also models the principles of the QIS framework in action, co-designed learning, reflection, evidence-informed practices, and meaningful participant engagement. Following the institute, the Washington-based team will support grantees with follow-up coaching, curated resources, and opportunities to extend their learning in their local context.

By delivering a reimagined Summer Institute that merges experiential learning with strategic alignment, NORC and its Washington-based team will ensure OSPI's investment translates into tangible improvement in program quality, staff confidence, and long-term system sustainability. The 2025 Summer Institute will set the tone for a new cycle of innovation and excellence in Washington's 21st CCLC landscape.

Service 9: Professional Learning Summit

The Professional Learning Summit is held each spring or fall as a full-day, in-person event. The Summit is designed to bring together approximately 100 site coordinators, program directors, and front-line staff to foster professional growth, deepen implementation of the Quality Improvement System (QIS), and promote network-wide alignment with OSPI goals.

Led by bob maureen, in partnership with OSPI and the Professional Learning Advisory Council, the Summit will be designed around a structured planning process that begins each fall. The NORC team will conduct a comprehensive needs assessment in collaboration with the Advisory and OSPI staff to identify priority topics. These topics will guide the selection of speakers, sessions, and facilitation methods to ensure the Summit remains grounded in evidence-informed practice and practitioner voice.

The Professional Learning Summit is more than a single training event. It is a strategic touchpoint within the QIS professional learning cycle. The NORC team, led by Operations Manager, Ms. Zacharia, will coordinate all logistical elements, including site selection, scheduling, contracting facilitators, and providing participant support. The Summit will rotate annually between Eastern, Central, and Western Washington to maximize accessibility and represent the geographic diversity of the state's grantees.

OSPI and Advisory Council members will also co-develop the content for workshops and plenaries. Sessions will be led by OSPI personnel and external facilitators with deep

expertise in out-of-school time programming, youth development, and site leadership. Workshop content will be immediately actionable, enabling attendees to return to their sites with new strategies and tools that can be effectively integrated into practice.

The NORC team will support ongoing program improvement through post-event evaluations, resource sharing via pdEnroller, and feedback analysis to continuously refine and elevate an event's value. Additionally, the NORC team will leverage AI tools to enhance communication and event management. AI-generated newsletters will deliver personalized content updates and reminders to participants based on their roles, past engagement, and expressed interests. Real-time registration data will be monitored and managed using AI-enhanced dashboards, enabling the team to identify trends in attendance, respond quickly to capacity issues, and adjust outreach strategies as needed. These innovations will help ensure a more responsive, efficient, and engaging experience for grantees throughout the year.

Table 7 summarizes the current service, outlines proposed improvements, and presents the short- and medium-term outcomes expected from this enhanced approach.

Table 7. Summary of Current Services and Proposed improvements

PLC Summit	Opportunity & Improvements	Outcomes
1-day training	Plan, organize, coordinate, and contract facilitators for approximately 100 21st CCLC staff and managers. Rotate event location between Eastern, Central, and Western WA to improve access and inclusivity.	Increased engagement and participation across geographic regions. Improved representation of rural and Tribal-serving programs.
Needs assessment with OSPI and Advisory	Convene a planning process to assess emerging needs, instructional priorities, and field-specific challenges. Incorporate student voice and coaching data to guide content selection.	Stronger alignment between workshop content and field needs. Better responsiveness to grantee-identified challenges.
Workshop development and facilitation	Coordinate with OSPI staff and external experts to design and deliver high-quality sessions aligned to QIS, SEL PQA, and youth engagement.	Enhanced practical application of Summit content. Greater QIS fidelity across programs.
Facilitate ongoing improvement	Collect and analyze feedback. Disseminate learning tools post-event through pdEnroller. Use insights to inform next year's planning cycle.	Continuous quality improvement and increased utility of Summit deliverables throughout the year.

The Summit is not a stand-alone event. Instead, it is part of a broader continuous improvement cycle. The NORC team will conduct post-event evaluations and generate usable deliverables, including session recordings, practical tools, and a summary of key learning takeaways. These materials will be disseminated through pdEnroller and other OSPI channels to ensure ongoing utility beyond the one-day gathering.

This structured, inclusive, and data-informed model ensures that the Professional Learning Summit is not only an annual highlight, but a sustained lever for program improvement, leadership development, and network-wide coherence. Through this approach, Washington's 21st CCLC system will continue to evolve in a direction that is responsive, sustainable, and aligned with statewide educational priorities.

Service 10: Program Director/Evaluator Meeting

The Program Director/Evaluator Meeting will be co-led by Project Manager, Dr. Gordon, and Dr. Todd Johnson. Table 8 includes a description of the service currently implemented followed by opportunities and proposed improvements based on our first-hand experience. The proposed improvements will lead to the short- and medium-term outcomes listed in the right-hand column.

Table 8. Current Service Implementation, Opportunities, and Proposed Improvements

Topic Area	Opportunity Areas	Proposed Improvements	Outcomes
Leadership Development Frameworks	Lack of formal 21 st CCLC leadership pathways and inconsistent role modeling across grantee sites.	Introduce leadership competencies (i.e. 10 skills of a high performing 21 st CCLC Program Director) and career ladders in the meeting agenda.	Clearer leadership development structure; improved retention and morale.
Compliance and QIS Fidelity Expectations	Uncertainty about compliance expectations and varied QIS implementation fidelity.	Present updated compliance tools, rubrics, and exemplars with OSPI facilitation.	Greater consistency and confidence in compliance practices across grantees.
Data-Informed Decision-Making Using Site-Level Tools	Inconsistent understanding and use of site-level performance data.	Model use of dashboards and local data systems; provide structured interpretation guides.	Improved program quality through evidence-informed decisions.

Topic Area	Opportunity Areas	Proposed Improvements	Outcomes
Professional Role Clarification (Director vs. Evaluator)	Blurry boundaries between directors and evaluators can create friction or duplication.	Facilitate role definition exercises and joint planning scenarios.	Stronger site operations through role clarity and team alignment.
Networking and Peer-Led Strategy Sharing	Staff members often feel isolated and unsupported, with no systematic sharing of best practices.	Use structured networking and peer storytelling in small group settings.	Strengthened peer learning and increased staff's sense of community.
Recognition and Staff Retention Strategies	Burnout and turnover are often linked to insufficient recognition or unclear advancement opportunities.	Recognize professional milestones and share pathways for career advancement in OST.	Higher satisfaction and reduced turnover among directors and evaluators.
Use of Professional Development Systems (e.g., pdEnroller)	Limited understanding of tracking tools for PD engagement and state reporting.	Demonstrate how pdEnroller data supports learning and program fidelity tracking.	More consistent engagement with professional development resources.
Feedback and Co-Creation of Technical Assistance Priorities	Technical assistance priorities are often determined top-down without direct input from practitioners.	Use feedback tools and interactive exercises to capture actionable input from attendees.	Responsive TA priorities are shaped by those closest to implementation.

The annual Program Director/Evaluator functions as a cornerstone of leadership and compliance events within Washington's 21st CCLC professional development system. This convening energizes the statewide 21st CCLC community, elevates shared successes, and reaffirms commitment to high-quality, student-centered afterschool learning. Through carefully curated content and responsive facilitation, this event fosters leadership growth, builds compliance capacity, and reinforces the mission of continuous improvement.

The agenda will be informed by data and built in collaboration with OSPI, the Advisory, and the Washington-based team. The event will be designed using participatory engagement methods that also convey learning messages for 21st CCLC site staff and evaluators. The NORC team along with SME Sorenson will focus on establishing a strong and cohesive sense of identity across Washington's 21st CCLC community. Ms. Sorenson will lead efforts to maintain connections among grantees to strengthen motivation and engagement. Attendees will be recognized for their professional

journeys (i.e. names of people who completed their certification) and contributions, reinforcing commitment to their roles and the statewide initiative.

Through this multi-dimensional support, the Program Director/Evaluator Meeting will help establish shared goals across the 21st CCLC community, increase staff retention and satisfaction, and enhance systemic quality by nurturing confident and compliant site leaders. Our expertise in facilitating high-impact professional convenings ensures that this service will be delivered with the professionalism, precision, and responsiveness that define our national leadership in out-of-school time systems development.

Service 11: Research and Reporting

Research and Reporting will be led by Dr. Gordon and supported by Dr. Serrano and other research staff. As one of the nation's most respected independent social research institutions, NORC at the University of Chicago brings unmatched expertise in quantitative and qualitative research, impact measurement, and continuous quality improvement. For Washington's 21st CCLC initiative, Dr. Gordon will work closely with Dr. Serrano and the NORC team to lead the development and implementation of a rigorous research and reporting framework that not only fulfills contractual requirements but also elevates statewide understanding of program performance, professional development effectiveness, and grantee experience.

Drs. Gordon and Serrano will use a mixed methods approach to gather both qualitative and quantitative data for this project. They will use focus groups, surveys, and assessments such as the SEL PQA. Formative data will be used to inform modifications to the project workplan, service area plans, including planned activities and events, and other elements of the project such as the professional certificate. Summative data will be used to prepare reports and plan year two implementation.

To elicit feedback from existing grantees, Drs. Gordon and Serrano will design focus group protocols to gather first-hand insights about implementation successes, barriers, and capacity needs as well as general insight into overall system improvement. Multiple sources will be utilized to shape protocol development including the use of prior reports [e.g., [CCLC Brief on 2022-2023 student and teacher surveys \(Gross et al., 2023\)](#) and [CCLC Facts and Figures Brief \(Afterschool Alliance, 2025\)](#)]. Building upon existing resources, protocols will be developed that inform initial quality improvement goals.

Three 60-minute focus groups will be conducted with representatives of current 21st CCLC grant recipients by Dr. Gordon. Data obtained through focus groups will be transcribed and analyzed using a qualitative data analysis software (e.g., Dedoose, MaxQDA) to generate anonymized thematic findings.

In addition to the focus groups, a **grantee survey** will provide a baseline from which to measure the five conditions of collective impact³. These foundational activities provide a critical launchpad for aligning support with the actual conditions of practice across the state. These data will provide information for us to move from disconnected grantee compliance to shared stewardship and collective leadership of 21st CCLC. Findings from the focus groups and surveys will be synthesized into a report and presented to OSPI and the Advisory Council to inform an evidence-based relaunch of QIS services.

Our objective and approach are not merely to collect data, but to guide strategic reorientation. The relaunch process will support the transition from a transactional model of "training delivery" to an integrated learning ecosystem focused on continuous improvement. It will support the development of a leadership pipeline that integrates compliance expertise, high-quality implementation of Quality Instructional Systems (QIS), Social and Emotional Learning (SEL) competencies, and personalized professional development aligned with educational career pathways. The NORC team aims to achieve sustainability by developing leadership and staff skills across the system rather than focusing on programs.

Our team will electronically administer **field-tested surveys** that measure satisfaction and will assess the effectiveness of training, coaching, and QIS implementation activities. Survey results will be integrated into a performance dashboard and compiled into quarterly memos that identify trends, highlight strengths, and provide actionable feedback to inform OSPI about decision-making. NORC's mixed-methods capabilities ensure that both statistical and narrative findings will be available to support real-time improvements and strategic planning. Table 9 presents the proposed data collection plan and Figure 5 presents a visualization of the flow of data and feedback loop.

Table 9. Data Collection Plan

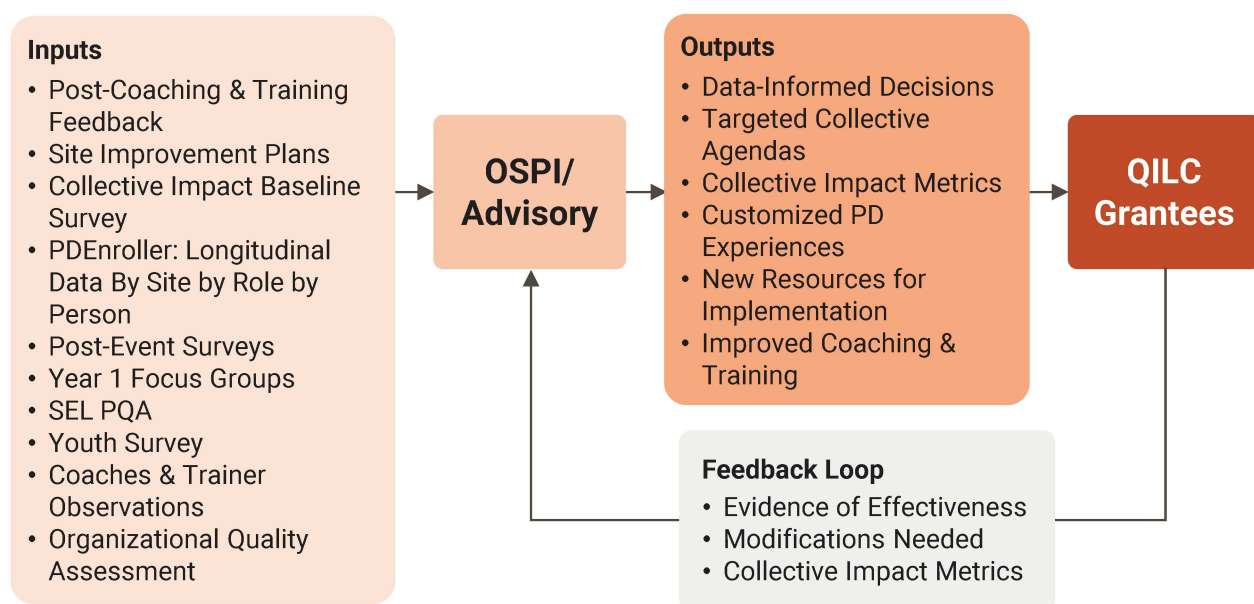
Instrument	Timing	Source	Use
Focus Group Protocols (new)	Y1-September	Stratified random sample existing grantees	Conduct 3 60-minutes focus group interviews to gather honest feedback for overall system improvement; signal to grantees a formal reset for needed boost in QIS buy-in.
Collective Impact Baseline Survey (new)	September	(Kania & Kramer, 2011) All existing grantees	Administer baseline survey to provide a starting point to determine approach.

³ Kania, J., & Kramer, M. (2011). Collective impact. Stanford Social Innovation Review 9(1), 36-41.
<https://doi.org/10.48558/5900-KN19>

Instrument	Timing	Source	Use
New Grantee Survey (new)	Rolling Basis		Administer a survey to assess knowledge, skills, abilities, and experience related to implementation of 21 st CCLC programs to identify gaps in their professional repertoire.
Post-event surveys (existing-enhanced)	After each event	pdEnroller	Administer survey to determine grantee needs to shape supports, formative feedback for improvement, summative measures to gauge progress toward measurable outcomes. Assorted quotes and data for newsletters and continuous communication pieces across 21 st CCLC community.
Post-coaching surveys (existing-enhanced)	After each coaching session	pdEnroller	Administer surveys to determine grantee needs to shape supports, formative feedback for improvement, summative measures to gauge progress toward measurable outcomes. Assorted quotes and data for newsletters and continuous communication pieces across 21 st CCLC community.
Post-training surveys (existing-enhanced)	After each training	pdEnroller	Administer survey to determine grantee needs to shape supports, formative feedback for improvement, summative measures to gauge progress toward measurable outcomes. Assorted quotes and data for newsletters and continuous communication pieces across 21 st CCLC community.
Organizational Quality Assessment (existing)	Spring	OSPI mandatory collection	Collect site-level data for site leadership to access and grow internal team. Longitudinal data will show trends to inform QIS plans. Share with OSPI and Advisory for data-informed decisions.
Youth Survey (existing)	Spring	OSPI mandatory collection	Collect site-level data for site leadership to access and grow internal team. Longitudinal data will show trends to inform QIS plans. Share aggregated data with OSPI and Advisory for data-informed decisions.

Instrument	Timing	Source	Use
SEL PQA (existing)	Winter	OSPI mandatory collection	Collect site-level data for site leadership to access and grow internal team. Longitudinal data will show trends to inform QIS plans. Share aggregated data with OSPI and Advisory for data-informed decisions.
QIS plans and data monitoring	Winter, Spring	OSPI mandatory collection	Collect site-level data for site leadership to access and grow internal team. Longitudinal data will show trends to inform QIS plans. Share aggregated data with OSPI and Advisory for data-informed decisions.

Figure 5. Data Flow and Feedback Loop Visualization



Data compiled through the focus groups, surveys, assessments, SEL PQA, and QIS plans will be reported in a set of deliverables that will be submitted quarterly throughout the project period. A SWOT Report, including a gap analysis; after event summary reports; monthly newsletters and coaching reports; quarterly progress reports; a project calendar and a data dashboard will be developed and shared regularly with OSPI. Table 10 shows the reporting plan for these deliverables. A schedule of these deliverables as well as the cost associated with each deliverable is detailed under **Performance Based Contracting** section as well as the **Cost Proposal** section.

Table 10. Reporting Plan

Report Type	Content	Timing
Strengths, Weaknesses, Opportunities, and Threats (SWOT) Baseline Report, including gap analysis	Summary of strengths, challenges, opportunities, and risks currently shaping Washington's 21st CCLC QIS	Fall 2025
Event Summary Reports	Registration and attendance numbers, key decisions, action items, feedback on the PD, and emergent themes	Six business days after convening
Newsletters	Summaries of advisory council activities, emerging themes, notable quotes, photos, action steps, and opportunities for feedback	Monthly
pdEnroller Coaching Reports	Quantitative and qualitative metrics on coaching desired and quality, usefulness, and relevance of the experience post-coaching	Monthly
Quarterly Progress Reports	Progress on deliverables, milestones, budget, quality control and risk mitigation	Quarterly
Calendar	Schedule of events	Fall
Data Dashboard	Data updates reflecting the main data systems	Quarterly

In addition to evaluation reporting, Ms. Zacharia, working with a NORC financial analyst, will prepare quarterly financial summaries (audits) with meticulous attention to federal fiscal accountability standards and regulations. These reports will include a breakdown of actual costs for each deliverable and a summary of budget expenditures. All expenditures will be tracked and mapped to contracted deliverables, ensuring transparent reporting and strong alignment with the Office of Financial Management's guidelines. The NORC team's project management infrastructure includes built-in audit readiness and internal compliance reviews, which safeguard OSPI's financial oversight responsibilities.

Critical to the success of this project is the coordinated communication between the NORC team, OSPI, and the current statewide evaluator, AIR. Dr. Gordon, who has a

collegiate working relationship with AIR will coordinate this effort. The NORC team will participate in planning calls, align timelines, and streamline data-sharing protocols to ensure the integration of state-level evaluation objectives with our reporting cycle. This collaboration reinforces data coherence and ensures that all reporting products serve not only accountability but also improvement and equity of opportunity for participating students.

By pairing high-utility research products with collaborative data interpretation, Dr. Serrano and her team ensures that Washington's 21st CCLC leadership is empowered to make informed decisions, guide improvement efforts, and demonstrate program value with confidence. Our research and reporting services are not merely compliance work; it is capacity-building research in the service of sustained educational impact.

Workplan

The workplan presented in Table 11 is an abbreviated workplan to convey the team's knowledge of the subject and skills necessary to provide Washington State's 21st CCLC QIS support and technical assistance. It may be revised based on the SWOT analysis conducted by the NORC and Washington-based teams to assess the strengths, challenges, opportunities, and risks currently shaping Washington's 21st CCLC QIS.

The workplan is comprised of eight overarching categories. Within each category the subtasks, services, activities, month due, and person responsible are listed to accomplish the scope of the project work defined in the RFP. Participants are noted for each entry as well as OSPI's involvement.

Table 11. Workplan

Activities	Category	Participant	Month Due	Person Responsible	OSPI Involvement
1.1 Pre-Launch meeting with Project Manager, Operations Manager, OSPI leads	Launch 2025-2026 21 st CCLC	OSPI, Project Manager/Operations Manager	Sept	Project Manager/Operations Manager	Yes
1.2 Launch meeting with full OSPI, NORC, WA Teams	Launch 2025-2026 21 st CCLC	OSPI, NORC, WA team members	Sept	Project Manager/Operations Manager	Yes
1.3 Recruit and select coaches	Launch 2025-2026 21 st CCLC	n/a	Sept	Service Lead maureen	Optional
1.4 Hold Orientation of New Grantees	Launch 2025-2026 21 st CCLC	OSPI, New Pgm Dir and Evaluators	Sept	Service Lead maureen	Yes
1.5 Hold Program Quality Orientation and Kickoff of PDs and SCs in cohorts 16, 17,18, and 19	Launch 2025-2026 21 st CCLC	OSPI, all grantees and evaluators	Sept	Service Lead maureen	Yes
1.6 Develop and initiate four modules of the professional learning series	Launch 2025-2026 21 st CCLC	All PDs and SCs	Oct/Nov	SME Expert Garrett/Service Lead maureen	No
1.7 Recruit and select Professional Learning Advisory Council members	Launch 2025-2026 21 st CCLC	OSPI, WA-team	Sept/Oct	Service Lead Johnson	Optional
1.8 Launch data collection infrastructure	Launch 2025-2026 21 st CCLC	NORC, WA team	Sept/Oct	Operations Manager/Project Manager	No

Activities	Category	Participant	Month Due	Person Responsible	OSPI Involvement
1.9 Hold first Advisory Meeting	Launch 2025-2026 21 st CCLC	OSPI, subset of NORC and WA Team	Oct	Service Lead Johnson	Yes
2.1 Inventory existing state data	SWOT Assessment and Establishment of Baseline	NORC team	Sept	Operations Manager	Yes, guidance
2.2 Identify existing and develop new performance metrics	SWOT Assessment and Establishment of Baseline	NORC team	Sept/Oct	Operations Manager	Yes, guidance
2.3 Use existing and develop instruments	SWOT Assessment and Establishment of Baseline	Project Manager/ NORC	Sept/Feb	Project Manager/ Operations Manager	Yes, review and approve
2.4 Deploy diagnostic surveys to grantees	SWOT Assessment and Establishment of Baseline	NORC team	Sept/Oct	Operations Manager	No
2.5 Conduct focus groups with grantees	SWOT Assessment and Establishment of Baseline	Project Manager	Sept	Project Manager	No
2.6 Develop, deploy, and report on post-coaching surveys in pdEnroller	SWOT Assessment and Establishment of Baseline	Project Manager	Oct.	Project Manager	No
2.7 Analyze data	SWOT Assessment and Establishment of Baseline	Project Manager/NORC Team	Oct	Project Manager/Operations Manager	No

Activities	Category	Participant	Month Due	Person Responsible	OSPI Involvement
2.8 Create SWOT Report	SWOT Assessment and Establishment of Baseline	Project Manager	Nov	Project Manager	No
2.9 Create Gap Analysis Matrix	SWOT Assessment and Establishment of Baseline	Project Manager	Nov	Project Manager	No
2.10 Present findings to OSPI and Advisory	SWOT Assessment and Establishment of Baseline	Project Manager, Operations Manager, Service Leads Johnson and maureen	Oct, Jan, Apr	Project Manager/Operations Manager	Yes
2.11 Institutionalize continuous improvement cycle into system	SWOT Assessment and Establishment of Baseline	NORC and WA Team	Nov/Dec	Operations Manager /Project Manager	Yes
3.1 Hold New Grantee Orientation	Task 3.0 Build 1 st Year Grantee QIS Capacity and Deliver Responsive QIS TA	OSPI, New Program Directors and Evaluators	Sept	Service Lead maureen	Yes
3.2 Pair Grantees with Coaches	Task 3.0 Build 1 st Year Grantee QIS Capacity and Deliver Responsive QIS TA	Service Lead maureen, 1 st year grantees, coaches	Oct/Nov	Service Lead maureen	No

Activities	Category	Participant	Month Due	Person Responsible	OSPI Involvement
3.3 Coaches' on-site visits to 1st year grantees	Task 3.0 Build 1 st Year Grantee QIS Capacity and Deliver Responsive QIS TA	1 st year grantees, coaches	Quarterly	Service Lead maureen	No
3.4 Coaches' co-develop detailed Implementation Plan with Grantees	Task 3.0 Build 1 st Year Grantee QIS Capacity and Deliver Responsive QIS TA	1 st year grantees, coaches	Nov/Dec	Service Lead maureen	No
3.5 Deliver specialized support to 1st year grantees	Task 3.0 Build 1 st Year Grantee QIS Capacity and Deliver Responsive QIS TA	1 st year grantees, coaches	Monthly	Service Lead maureen	No
4.1 Develop custom Washington State Leadership Practice Series	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	Subset of WA Team	Sept/Dec	SME Garrett	Optional
4.2 Hold QIS Self SEL PQA Training	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	All PDs, SCs, site staff, coaches	Oct/Nov	Service Lead maureen	No
4.3 Hold Professional Learning Summit	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	All PDs, SCs, site staff, coaches	March	Service Lead maureen	Optional

Activities	Category	Participant	Month Due	Person Responsible	OSPI Involvement
4.4 Hold Director and Evaluator Meeting	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	All PDs, SCs, site staff, evaluators	March	Project Manager	Yes
4.5 Hold TOT training	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	Open to all evaluators, grantees, ESDs, potentially OR, AK, ID, MT	Oct/Nov	Service Lead maureen	No
4.6 Hold SEL TOF training	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	Open to all evaluators, grantees, ESDs, potentially OR, AK, ID, MT	Oct/Nov	Service Lead maureen	No
4.7 Hold Summer Learning Days	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	All grantees and evaluators	May/June	SME Cummings	Optional
4.8 Hold QIS and Capacity Building Training Planning with Data	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	All PDs, SCs, coaches, evaluators	Dec/Jan	Service Lead maureen	Optional

Activities	Category	Participant	Month Due	Person Responsible	OSPI Involvement
4.9 Hold QIS Refresher	Build Statewide Grantee and TA Providers' Capacity to Support Washington's 21 st CCLC	All PDs, SCs	Oct/Nov	Service Lead maureen	Optional
5.1 Hold Advisory Council Meetings	OSPI/Advisory 21 st CCLC Leadership	OSPI, subset of NORC and WA Team	Oct/Jan/Apr	Service Lead Johnson	Yes
5.2 Check-in with Coaches	OSPI/Advisory 21 st CCLC Leadership	4 coaches	Monthly	Service Lead maureen	Optional
5.3 Progress report meetings with OSPI	OSPI/Advisory 21 st CCLC Leadership	OSPI, subset of NORC and WA Team	Monthly	Operations Manager/Project Manager	Yes
5.4 Planning meeting	OSPI	Project Manager/Operations Manager	Annually in May	Project Manager/Operations Manager	Yes
6.1 Employ NORC's Non-Discrimination and Accessibility communication protocols	Develop Continuous Communication Strategy	NORC	Daily	Operations Manager	No
6.2 Develop data tables with contextual information of current grantees	Develop Continuous Communication Strategy	NORC	Sept	Operations Manager	Optional guidance

Activities	Category	Participant	Month Due	Person Responsible	OSPI Involvement
6.3 Create monthly newsletter template for OSPI approval	Develop Continuous Communication Strategy	NORC	Monthly	Operations Manager	Yes, approval
6.4 Establish equitable process to gather newsletter content for OSPI approval	Develop Continuous Communication Strategy	NORC/Project Manager	Sept/Oct	Operations Manager/Project Manager	Optional
6.5 Pilot launch of newsletter	Develop Continuous Communication Strategy	NORC	Oct	Operations Manager	Optional
6.6 Establish feedback form for recipients	Develop Continuous Communication Strategy	NORC	Oct	Operations Manager	Optional
6.7 Send Event Summary Reports	Develop Continuous Communication Strategy	Project Manager	After each event	Project Manager	Optional
6.8 Launch monthly newsletters	Develop Continuous Communication Strategy	NORC	Monthly	Operations Manager	No
7.1 Enter events and coaching sessions into pdEnroller	Utilize existing and develop new data infrastructure	NORC	As needed	Operations Manager	No
7.2 Develop code to build data dashboard	Utilize existing and develop new data infrastructure	NORC/Project Manager	Sept/Oct	Operations Manager/Project Manager	No

Activities	Category	Participant	Month Due	Person Responsible	OSPI Involvement
7.3 Design data gathering templates	Utilize existing and develop new data infrastructure	NORC/Project Manager	Sept-Nov	Operations Manager/Project Manager	No
7.4 Design reporting formats for OSPI approval	Utilize existing and develop new data infrastructure	NORC/Project Manager	Sept - Nov	Operations Manager/Project Manager	Yes, review
8.1 Develop data transfer protocols for OSPI program continuity	Data disposition	NORC	Sept 2027	Operations Manager	Yes, guidance
8.2 Prepare archives of materials in OSPI-approved formats	Data disposition	NORC	Sept 2027	Operations Manager	Yes, approval
8.3 Electronically shred all project-related documents on NORC's server and contractors' laptops	Data disposition	NORC	Sept 2027	Operations Manager	No
8.4 Provide documentation of sanitization to CO and/or COR applicable	Data Disposition	NORC	Sept 2017	Operations Manager	No

Upon the start of the project, all tasks and subtasks will be entered into Microsoft Project with exact due dates, length of time, resources required, and dependencies as described in the next section.

Project Schedule

Our project schedule is organized by month from September 1, 2025, to August 31, 2027. During this period, the NORC team and its partners will adhere to the detailed project schedule presented in Table 12 and institute rigorous processes that ensures clear communication for all tasks, sub-tasks, and deliverables to be completed on time and within budget.

First, a detailed comprehensive project will be developed in Microsoft Project. This facilitates pairing the level of staffing and resources necessary to meet milestones and produce quality deliverables with the flexibility necessary to respond to challenges and maximize opportunities. NORC-led tasks will be managed by Ms. Zacharia who will assign task leads for each sub-task to manage NORC research and technical staff, monitor progress, coordinate, and proactively identify potential issues. Each NORC task lead will report to Ms. Zacharia in an internal weekly progress meeting.

Ms. Zacharia, the dedicated Operations Manager, will prepare project plans, timelines, and projections and regularly monitors schedules, assesses needs for adjustment, and evaluate the impact of task-level schedule changes on the project. Progress toward tasks and deliverables will be reviewed by Dr. Gordon and Ms. Zacharia on a weekly basis and reported to OSPI monthly to ensure accountability, adapt to evolving needs, and ensure that all elements are successfully executed on schedule.

Table 12. Project Schedule Matrix

		Timeline																										
Activities	Time-frame	Year 1													Year 2													
		Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept 2027		
Task 1.0: Launch 2025-2026 21st CCLC																												
1.1 Pre-Launch meeting with leads	Sept																											
1.2 Launch with full OSPI, NORC, WA Teams	Sept																											
1.3 Recruit and select coaches	Sept																											
1.4 Hold Orientation of New Grantees	Sept																											
1.5 Hold Program Quality Orientation and Kickoff of PDs and SCs in cohorts 16, 17,18, and 19	Sept																											
1.6 Develop and initiate four modules of the professional learning series	Oct/Nov																											

		Timeline																								
Activities	Time-frame	Year 1												Year 2												
		Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept 2027
1.7 Recruit and select Profes- sional Learning Advisory Council members	Sept/Oct																									
1.8 Launch data collection infra- structure	Sept/Oct																									
1.9 Hold first Ad- visory Meeting	Oct																									
Task 2.0: SWOT Assessment and Establishment of Baseline																										
2.1 Inventory exist- ing state data	Sept																									
2.2 Identify exist- ing and develop new performance metrics	Sept/Oct																									
2.3 Use existing and develop instru- ments	Sept/Feb																									
2.4 Deploy diag- nostic surveys to grantees	Sept/Oct																									
2.5 Conduct focus groups with grant- ees	Sept																									

		Timeline																										
Activities	Time-frame	Year 1													Year 2													
		Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept 2027		
2.6 Develop, de- ploy, and report on post-coaching sur- veys in pdEnroller	Oct																											
2.7 Analyze data	Oct																											
2.8 Create SWOT Report	Nov																											
2.9 Create Gap Analysis Matrix	Nov																											
2.10 Present find- ings to OSPI and Advisory	Oct/Jan/A pr																											
2.11 Institutional- ize continuous im- provement cycle into system	Nov/Dec																											
Task 3.0: Build 1st Year Grantee QIS Capacity and Deliver Responsive QIS TA																												
3.1 Hold New Grantee Orienta- tion	Oct/Nov																											
3.2 Pair Grantees with Coaches	Oct/Nov																											
3.3 Conduct on- site coaching visits to 1st year grant- ees	Quarterly																											

		Timeline																								
Activities	Time-frame	Year 1												Year 2												
		Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept 2027
3.4 Coach Co-Develops Detailed Implementation Plan with Grantees	Nov/Dec																									
3.5 Deliver specialized support to 1st year grantees	Monthly																									
Task 4.0: Build Statewide Grantee and TA Providers’ Capacity to Support Washington’s 21st CCLC																										
4.1 Develop custom Washington State Leadership Practice Series	Sept/Dec																									
4.2 Hold QIS Self SEL PQA Training	Oct/Nov																									
4.3 Hold Professional Learning Summit	March																									
4.4 Hold Director and Evaluator Meeting	March																									
4.5 Hold TOT training	Oct/Nov																									
4.6 Hold SEL TOF training	Oct/Nov																									
4.7 Hold Summer Learning Days	May/June																									

		Timeline																										
Activities	Time-frame	Year 1													Year 2													
		Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept 2027		
4.8 Hold QIS and Capacity Building	Dec/Jan																											
4.9 Training Planning with Data																												
4.10 Hold QIS Re-fresher	Oct/Nov																											
Task 5.0: OSPI/Advisory 21st CCLC Leadership																												
5.1 Hold Advisory Council Meetings	Oct/Jan/ Apr																											
5.2 Check-in with Coaches	Monthly																											
5.3 Progress report meetings with OSPI	Monthly																											
5.4 Planning meeting	Annually (May)																											
Task 6.0: Develop Continuous Communication Strategy																												
6.1 Employ NORC's Non-Discrimination and Accessibility communication protocols	Daily																											
6.2 Develop data tables with contextual information of current grantees	Sept																											

		Timeline																								
Activities	Time-frame	Year 1												Year 2												
		Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept 2027
6.3 Create monthly newsletter template for OSPI approval	Monthly																									
6.4 Establish equitable process to gather newsletter content for OSPI approval	Sept/Oct																									
6.5 Pilot launch of newsletter	Oct																									
6.6 Establish feedback form for recipients	Oct																									
6.7 Send Event Summary Reports	After each event																									
6.8 Launch monthly newsletters	Monthly																									
Task 7.0: Utilize Existing and Develop New Data Infrastructure																										
7.1 Enter events and coaching sessions into pdEnroller	Monthly (as needed)																									
7.2 Develop code to build data dashboard	Sept/Oct																									

Deliverables

All activities and services under this contract will be structured to produce clear, actionable deliverables aligned with five core areas essential to sustainable program transformation:

#1 Accountability and Compliance: The NORC team has deep experience in developing tools, monitoring systems, and reporting protocols to support state and federal program compliance. Under this contract, the NORC team will ensure consistent documentation, performance verification, and role-based implementation planning.

- Orientation materials and tools for new grantees
- QIS fidelity protocols, scoring rubrics, and assessment procedures
- Site implementation plans for new grantees
- Monitoring logs and regional coaching reports from ESD instructional coaches and consultants

#2 Foster Communities of Learning and Improvement: The NORC team's national TA model emphasizes peer learning, shared leadership, and regional calibration. Through intentional convenings and professional networks, this work fosters an enduring ecosystem of shared learning across Washington's 21st Century Community Learning Centers (CCLC) system.

- Planning and facilitation of statewide convenings, including the Summer Institute and Professional Learning Summit
- Role-aligned learning sequences (e.g., Leadership Practice Series)
- Coaching implementation of fidelity snapshots and support logs
- Grantee engagement events, including focus groups and Advisory meetings

#3 21st CCLC Personal Career Growth: The NORC team's commitment to workforce development will be evident in resources that inspire, credential, and advance the careers of 21st CCLC staff. Our creative, data-driven professional development tools and visual career pathways are designed to help OST professionals grow into QIS system leaders. This certificate program will offer a focused curriculum that targets specific skills. It will be developed and delivered by experience designers and instructors and includes the use of current resources as well as **new resources and modules** that fill existing gaps in the knowledge, skills, and abilities of Program Directors and Site Coordinators. It will provide practical, hands-on experiences that promote immediate application of newly learned skills. It is reasonable in length (virtual modules take about 90 minutes each). Workshops of greater length, such as Planning with Data and Basics are also included in the certificate program.

Benefits of a Program Director Professional Certificate. Certificate programs provide targeted, specialized training that enhances skills, ensures compliance with regulations, and supports career advancement. Achieving a certification boosts self-confidence and provides a sense of personal satisfaction. Earning a Program Director

Professional Certificate serves participants in five ways: (1) it validates professional knowledge and expertise; (2) it ensures a comprehensive skill set; (3) it provides a pathway for career growth and differentiation; (4) it contributes to building a network and a professional community; and (5) it builds confidence in leadership, problem-solving, and decision-making.

Furthermore, participation in a Program Director Professional Certificate program can help OSPI meet its own goals and objectives through greater compliance and accountability to the QIS. When 21st CCLC have a sense of passion and are intrinsically motivated, they will better understand the knowledgebase and evidence-based practices that underpin strong out-of-school programs, which will increase both resilience and retention. Table 13 below outlines specific modules and module descriptions for the Program Director Professional Certificates, and Figure 6 provides a sample poster for a Career Pathway for 21st CCLC Program Director.

Table 13. Program Director Professional Certificate Modules and Descriptions

Module	Title	Description
1	The Role of the Program Director in 21 st CCLC Projects	In this module participants will learn how a successful CCLC application becomes a contract between the provider and OSPI. They will explore the role of the program director in contract management and OSPI requirements for fulfilling the contract, for example partner engagement. They will in depth the OSPI performance indicators and the ways in which program directors ensure support for the state superintendent's priorities and objectives.
2	21 st CCLC Project Budget and Finance	This module addresses strategies for managing a budget that the PD may not have helped create. It includes information about how to work with the sponsoring agency business office; tracking income and expenditures; and how to prepare financial reports for OSPI, the sponsoring agency, and grantees. It also includes the exploration of risk management and its relation to budget and finance.
3	The Role of the Program Director in Personnel Management	21 st CCLC projects generally have one or more staff who report to them. In all programs, however, the PD is responsible for oversight of all programmatic aspects including personnel. In this module program directors will examine the difference between supervision and evaluation; strategies and practices for managing difficult employees; strategies and activities for team building; and ways to resolve conflict between one or more employees. Participants will learn also how to serve as a coach and a mentor to other project staff. This module also engages PDs in a discussion about the requirement to interface with the regular school staff and presents the most successful ways to do that with fidelity to the project.

Module	Title	Description
4	The Role of the 21 st CCLC Program Director in Program Evaluation	Utilizing current resources, the Program Director will learn how to better utilize existing resources such as the comprehensive Local Evaluation Toolkit. The will go deeper on exploring assumptions and strategically placing data collection events to test assumptions. This module will reinforce OSPI compliance requirements for evaluation and teach sites how to streamline data collection to realize efficiencies. Evaluators may be asked to join their site's Program Director and Site Coordinator.
5	Cultural Competence	Washington State is one of the most diverse states in the country. Persons of color now make up the majority of students enrolled in Washington schools. In this module, 21 st CCLC program directors will explore their own values, beliefs, and customs as well as those of the students they serve in their respective programs (for example American Indian/Native Alaskan, Hispanic, Black, or Asian. They will develop knowledge and skills to enhance their intercultural interactions through effective communication, relationship building and adapted instruction that is inclusive and response to the cultural context of students in out-of-school programs.
6	The Role of the Program Direction in Change Management	This module will explore ways in which 21 st CCLC programming requires consideration of change. The content of this module includes an exploration of (1) attitudes toward change; (2) the change process; (3) barriers to change; and (4) helping 21 st CCLC staff and regular school staff structure and plan for new ways of being (making a paradigm shift). Program directors will learn how to be agents of change in systems that often promote the status quo.
7	The 21 st CCLC Program Director as Mentor and Coach	In this module, program directors will explore the difference between coaching and mentoring. They will learn about and practice skills such as active listening, effective communication, empathy, and providing constructive feedback. They will learn why leadership, relationship building, and organizational skills are essential to guiding and supporting mentees effectively.

Figure 6. Sample Poster for a Career Pathway for 21st CCLC Program Director



Certificate Program Description. This certificate program consists of 10 skills presented as modules that use some current resources and courses; however, also include **new resources and modules that will fill an existing gap** in knowledge, skills, and abilities of Program Directors. Virtual modules will take approximately 60 minutes. Independent review of existing TA resources (i.e. Local Evaluation Toolkit) may take less than 60 minutes. Lengthy in-person courses, such as Planning with Data and Basics are included here.

Individuals who complete this certificate, especially new grantees, will have a sense of passion to belong to the 21st CCLC community and intrinsic motivation to comply and be accountable to the QIS. They also will better understand the knowledgebase and evidence-based practices that underpin strong out-of-school programs.

Benefits of a Program Director Professional Certificate. Earning a Program Director Professional Certificate serves participants in five ways: (1) it validates professional knowledge and expertise; (2) it ensures a comprehensive skill set; (3) it provides a pathway for career growth and differentiation; (4) it contributes to building a network and a professional community; and (5) it builds confidence in leadership and decision-making.

#4 Research and Reporting: With a national reputation in education research and program evaluation, NORC ensures rigorous data tracking, transparent fiscal reporting, and actionable performance summaries. All reports will be delivered with a focus on clarity, accuracy, and real-time relevance.

- Real-time participation dashboards and event registration logs
- Post-training satisfaction surveys and outcome summaries
- Quarterly financial and deliverable tracking reports
- Annual performance and impact report for OSPI

#5 Constant Communication: NORC has demonstrated success and experience designing strategic communication systems that elevate field engagement, clarify expectations, and celebrate local achievements. Under this contract, NORC will implement a comprehensive communication strategy to keep grantees informed, inspired, and connected. This will include interactive tools and multi-format storytelling aligned with OSPI branding and responsive to field input.

- Monthly newsletter co-developed with OSPI (e.g., “Stay in the Loop!”), featuring best practices, professional development highlights, success stories, and upcoming events
- Project resource webpage and communications toolkit offering centralized access to key resources and guidance
- Digital storytelling features, including interviews and data-informed impact narratives from 21st CCLC sites
- OSPI & grantee briefings to ensure alignment, responsiveness, and collaborative decision-making

Performance-based Contracting

NORC fully supports Washington State’s directive under RCW 39.26.180 to implement performance-based contracting. To that end, this proposal incorporates a delivery framework in which project payments are directly tied to clearly defined outputs, progress milestones, and measurable outcomes. This approach ensures fiscal accountability, maximizes return on investment, and reinforces OSPI’s stewardship of federal funds. Each core task outlined in the RFP, ranging from the development of the QIS system and facilitation of professional development to the deployment of coaching and execution of the summer institute, has defined deliverables and expected outcomes. NORC proposes aligning payment disbursements with the successful and timely completion of these deliverables. Table 14 shows expected deliverables, and performance measures or outcomes by quarter for Year 1. Year 2 will have similar deliverables. In both project years deliverables will be submitted to OSPI on a quarterly basis. Payments tied to each deliverable is shown in Table 15.

Table 14. Expected deliverables, performance measures, or outcomes

Deliverable	Expected Deliverables, Performance Measures, or Outcomes			
	Quarter 1 (Sept-Nov)	Quarter 2 (Dec-Feb)	Quarter 3 (Mar-May)	Quarter 4 (June-Aug)
SWOT Report, including gap analysis matrix	SWOT report and gap analysis matrix completed			
Event Summary Reports	25% of event summary reports completed	50% of event summary reports completed	75% of event summary reports completed	100% of event summary reports completed
Newsletters	25% of newsletters developed and distributed	50% of newsletters developed and distributed	75% of newsletters developed and distributed	100% of newsletters developed and distributed
pdEnroller Coaching Reports	25% of pdEnroller reports completed	50% of pdEnroller reports completed	75% of pdEnroller reports completed	100% of pdEnroller reports completed
Coaching Check-Ins	25% of coaching check-ins completed	50% of coaching check-ins completed	75% of coaching check-ins completed	100% of coaching check-ins completed
Quarterly Progress Reports	First quarter progress report developed and delivered	Second quarter progress report developed and delivered	Third quarter progress report developed and delivered	Fourth quarter progress report developed and delivered
Calendar	Shared grantee calendar developed and posted	Quarter 2 updates to calendar if needed	Quarter 3 updates to calendar if needed	Quarter 4 updates to calendar if needed
Data Dashboard	Dashboard developed and posted	Quarter 2 updates to dashboard	Quarter 3 updates to dashboard	Quarter 4 updates to dashboard

Deliverable	Expected Deliverables, Performance Measures, or Outcomes			
	Quarter 1 (Sept-Nov)	Quarter 2 (Dec-Feb)	Quarter 3 (Mar-May)	Quarter 4 (June-Aug)
Curriculum Modules	50% of modules developed and delivered	100% of modules developed and delivered		
Utilize existing tech infrastructure	Train pdEnroller users; enter 50% of the courses	Enter 100% of the courses for grantees into pdEnroller		
Events/Internal Planning (virtual and online)	Planned quarter 1 events are held	Planned quarter 2 events are held	Planned quarter 3 events are held	Planned quarter 4 events are held
Professional Learning Advisory Council	100% of members are successfully recruited; 1 st council is held (Oct)	2 nd Advisory Council is held (Jan)	3 rd and final Advisory Council is held (Apr)	

Table 15. Deliverables/Performance Measure/Outcome Payment Schedule

Quarter	Deliverable/Performance Measure/Outcome	Payment Schedule	Payment Amount
Year 1 Quarter 1 (Sept-Nov 25)	• SWOT report and gap analysis matrix, 12% - \$8,249.91 • 25% of event summary reports, 12% - \$8,249.91 • 25% of newsletters, 12% - \$8,249.91 • 25% of pdEnroller reports, 5% - \$3,437.46 • 25% of coaching check-ins, 5% - \$3,437.46 • First quarter progress report, 12% - \$8,249.91 • Grantee calendar, 5% - \$3,437.46 • Data dashboard 50% complete, 12% - \$8,249.91 • 50% of modules, 5% - \$3,437.46 • Train pdEnroller users; enter 50% of the courses, 5% - \$3,437.46 • Quarter 1 events, 10% - \$6,874.93 • 100% of members are successfully recruited; 1st council is held, 5% - \$3,437.46	December 31, 2025	\$68,749.25
Year 1 Quarter 2 (Dec-Feb 26)	• 50% of event summary reports, 12% - \$8,249.91 • 50% of newsletters, 12% - \$8,249.91 • 50% of pdEnroller reports, 5% - \$3,437.46 • 50% of coaching check-ins, 5% - \$3,437.46 • Second quarter progress report, 12% - \$8,249.91 • Quarter 2 updates to calendar, 5% - \$3,437.46 • Quarter 2 updates to dashboard, 12% - \$8,249.91 • 100% of modules, 10% - \$6,874.93 • Enter 100% of the courses, 10% - \$6,874.93 • Quarter 2 events, 12% - \$8,249.91 • 2nd Advisory Council is held, 5% - \$3,437.46	March 31, 2026	\$68,749.25

Quarter	Deliverable/Performance Measure/Outcome	Payment Schedule	Payment Amount
Year 1 Quarter 3 (Mar-May 26)	75% of event summary reports, 15% - \$10,312.39 75% of newsletters, 15% - \$10,312.39 75% of pdEnroller reports, 6% - \$4,124.96 75% of coaching check-ins, 6% - \$4,124.96 - Third quarter progress report, 15% - \$10,312.39 - Quarter 3 updates to calendar, 7% - \$4,812.45 - Quarter 3 updates to dashboard, 15% - \$10,312.39 - Quarter 3 events, 15% - \$10,312.39 3rd and final Advisory Council is held, 6% - \$4,124.96	June 30, 2026	\$68,749.25
Year 1 Quarter 4 (June-Aug 26)	100% of event summary reports, 15% - \$10,312.39 100% of newsletters, 15% - \$10,312.39 100% of pdEnroller reports, 9% - \$6,187.43 100% of coaching check-ins, 9% - \$6,187.43 - Fourth quarter progress report, 15% - \$10,312.39 - Quarter 4 updates to calendar if needed, 7% - \$4,812.45 - Quarter 4 updates to dashboard, 15% - \$10,312.39 - Quarter 4 events, 15% - \$10,312.39	September 30, 2026	\$68,749.25

Quarter	Deliverable/Performance Measure/Outcome	Payment Schedule	Payment Amount
Year 2 Quarter 1 (Sept-Nov 26)	• 25% of event summary reports, 12% - \$8,245.71 • 25% of newsletters, 12% - \$8,245.71 • 25% of pdEnroller reports, 5% - \$3,435.71 • 25% of coaching check-ins, 5% - \$3,435.71 • First quarter progress report, 12% - \$8,245.71 • Grantee calendar, 5% - \$3,435.71 • Data dashboard, 12% - \$8,245.71 • 50% of modules, 10% - \$6,871.42 • Train pdEnroller users; enter 50% of the courses, 10% - \$6,871.42 • Quarter 1 events, 12% - \$8,245.71 • 100% of members are successfully recruited; 1st council is held, 5% - \$3,435.71	December 31, 2026	\$68,714.24
Year 2 Quarter 2 (Dec-Feb 27)	• 50% of event summary reports, 12% - \$8,245.71 • 50% of newsletters, 12% - \$8,245.71 • 50% of pdEnroller reports, 5% - \$3,435.71 • 50% of coaching check-ins, 5% - \$3,435.71 • Second quarter progress report, 12% - \$8,245.71 • Quarter 2 updates to calendar, 5% - \$3,435.71 • Quarter 2 updates to dashboard, 12% - \$8,245.71 • 100% of modules, 10% - \$6,871.42 • Enter 100% of the courses, 10% - \$6,871.42 • Quarter 2 events, 12% - \$8,245.71 • 2nd Advisory Council is held, 5% - \$3,435.71	March 31, 2027	\$68,714.24

Quarter	Deliverable/Performance Measure/Outcome	Payment Schedule	Payment Amount
Year 2 Quarter 3 (Mar-May 27)	75% of event summary reports, 15% - \$10,307.14 75% of newsletters, 15% - \$10,307.14 75% of pdEnroller reports, 6% - \$4,122.85 75% of coaching check-ins, 6% - \$4,122.85 - Third quarter progress report, 15% - \$10,307.14 - Quarter 3 updates to calendar, 7% - \$4,810.00 - Quarter 3 updates to dashboard, 15% - \$10,307.14 - Quarter 3 events, 15% - \$10,307.14 3rd and final Advisory Council is held, 6% - \$4,122.85	June 30, 2027	\$68,714.24
Year 2 Quarter 4 (June-Aug 27)	100% of event summary reports, 15% - \$10,307.14 100% of newsletters, 15% - \$10,307.14 100% of pdEnroller reports, 9% - \$6,184.28 100% of coaching check-ins, 9% - \$6,184.28 - Fourth quarter progress report, 15% - \$10,307.14 - Quarter 4 updates to calendar if needed, 7% - \$4,810.00 - Quarter 4 updates to dashboard, 15% - \$10,307.14 - Quarter 4 events, 15% - \$10,307.14	September 30, 2027	\$68,714.24
Year 1 Total			\$274,997
Year 2 Total			\$274,857
Overall Total			\$549,854

To maintain alignment with OSPI's administrative expectations, NORC will also maintain a deliverable tracking system and submit a detailed payment schedule and timeline for review and approval. This system will enable flexible pacing of funds based on actual progress rather than merely elapsed time.

Through this approach, NORC affirms its commitment to performance-based service delivery and financial transparency. By anchoring payments to outcomes, we help ensure that each dollar entrusted to the 21st CCLC QIS initiative produces measurable value for students, educators, and communities statewide.

Outcomes and Performance Measurement

The NORC-led 21st CCLC QIS initiative is designed to generate measurable improvements in program quality, staff capacity, student development, and system sustainability. All outcomes are aligned with OSPI's performance expectations and will be tracked using valid tools, secure systems, and data-informed reporting strategies. The following outcomes reflect our commitment to delivering an accountable, scalable, and high-impact QIS support system across Washington State.

- *Improved participation and implementation fidelity* will be evidenced by 99 percent of 21st CCLC grantees participating in all required QIS activities and submitting timely site-level Quality Improvement Plans (QIPs). To monitor progress, NORC will collect and log all TA sessions, coaching engagements, and QIS events in a centralized database, disaggregated by region, grade band, and delivery format.
- *Increased staff and site director competency* will be measured through pre- and post-assessments, implementation logs, and self-reported confidence surveys. These tools will assess the utility of training, applied knowledge, and skill acquisition in areas such as social-emotional learning (SEL) integration, instructional leadership, and data use. Results will be compiled into quarterly progress snapshots to identify growth trends and areas for improvement.
- *Enhanced site-level quality* will be demonstrated by annual improvements in fidelity to the SEL PQA domains at coached sites. External assessors and certified coaches will conduct structured observations and score programs using calibrated protocols. These scores will be compared to baseline data and integrated into regional reports submitted to OSPI.
- *Professional learning effectiveness* will be demonstrated through at least 90 percent participant attendance in required professional development sessions and satisfaction scores averaging 4 or higher on a five-point scale. NORC will administer post-training evaluation forms and aggregate the findings to inform continuous improvement of delivery and content.
- *Data-driven decision-making* will be documented in 99 percent of participating grantee sites through completed Quality Improvement Plans (QIPs) that cite specific data sources, including SEL PQA results, grantee feedback, and student performance indicators. NORC's technical assistance staff and partners will provide implementation support and track the usage of these tools.

- *Key performance indicators (KPIs)* will be monitored and shared through quarterly dashboards, annual evaluation reports, and executive briefing materials. Each report will include data disaggregated by site, delivery method, and grantee year. Our approach allows OSPI to monitor trends and intervene when outcomes fall below targets.
- *Grantee feedback* will inform system refinement through annual surveys, listening sessions, and consultations with the Advisory. These inputs will guide system modifications and ensure the QIS framework remains responsive to field needs and site-level realities.

Built on a foundation of applied research, field-tested methodologies, and Washington’s unique grantee landscape, NORC’s performance framework delivers a clear and compelling roadmap for OSPI to achieve its short-term priorities while laying the groundwork for long-term success. NORC’s nationally recognized expertise, operational infrastructure, and capacity-building approach are aligned to ensure every deliverable meets the highest standards of accountability and utility. Just as importantly, our system is designed to empower grantees with the tools and support they need to sustain continuous improvement and achieve site-level ownership. Through the strategic use of performance data, dynamic reporting systems, and targeted coaching, OSPI will have the capacity to monitor implementation fidelity, address emerging challenges, and guide innovation in real-time. This integrated approach fosters trust, strengthens statewide consistency, and ensures that Washington’s 21st CCLC programs remain responsive, high-performing, and sustainable long after the current contract ends.

Risks

The NORC-led 21st CCLC QIS initiative is structured to ensure stability, consistency, and high-quality service delivery across all implementation phases. Nonetheless, the scale and complexity of coordinating statewide technical assistance, regional coaching, professional learning, and compliance monitoring introduce a range of operational and strategic risks. We recognize that proactive risk mitigation, transparency, and continuity planning are essential to safeguarding project success and preserving OSPI’s contractual and programmatic integrity. The following key risk categories and mitigation strategies will be continuously monitored and managed throughout the duration of the contract.

Personnel continuity and staff turnover will be mitigated by designating backup personnel for all key roles and maintaining a staffing continuity matrix that maps each responsibility to a primary and secondary team member. Onboarding procedures will be documented through internal playbooks, and all training materials, coaching templates, and grantee communication records will be housed in a centralized digital repository. In the event of turnover, cross-trained staff will assume responsibilities within 48 to 72 hours, minimizing disruption to service delivery and ensuring uninterrupted support to OSPI and grantees.

Business continuity during disruptions will be ensured through a plan that includes full remote access to all project tools, secure data systems, and video conferencing platforms. Every aspect of the QIS service, from technical assistance to training, will be designed for hybrid delivery, allowing for a seamless transition to virtual formats as needed. Redundant infrastructure and backup communication protocols will support continuous operations in the event of travel restrictions, facility loss, or labor disruptions.

Regional variation in implementation quality will be addressed by standardizing training protocols, embedding coaching fidelity rubrics, and providing all coaches with support through calibration sessions. Each Educational Service District and subcontracted consultant will adhere to unified guidance materials curated and maintained by NORC. Coaching logs, fidelity snapshots, and qualitative observations will be collected quarterly and reviewed with OSPI to identify and address inconsistencies early.

Low grantee participation or engagement will be managed through monitoring via NORC's participation dashboard, enabling proactive outreach to sites with low attendance. Local and regional leads will work with the teams to offer corrective support tailored to each site's needs. Hybrid scheduling options and asynchronous learning opportunities will further reduce barriers to engagement, allowing for greater flexibility in participation.

Reporting and fiscal accountability will be ensured through quarterly deliverable-linked financial reports, variance tracking, and budget dashboards. NORC's dedicated financial analyst will coordinate closely with the Operations Manager to maintain compliance with all fiscal requirements. Internal audits and monthly budget reviews will provide early warning for discrepancies, and all financial reporting will be aligned with Office of Financial Management guidelines.

Changes in policy and funding available to programs will be ensured through flexibility and responsiveness to political, policy, and funding dynamics, while maintaining true to the goals of the project. Our implications and ultimate lessons learned will be examined in the context of the current moment, with clear implications for a dynamic, changing system. The timing of this project could be a challenge, considering the amount of change, transition, and growth occurring across the system. This challenge, however, is also added justification for the importance of the work at hand.

Ongoing risk monitoring and communication will be maintained through a formal risk register that captures risk type, status, mitigation strategy, and timeline for resolution. This register will be updated continuously and reviewed in OSPI coordination meetings on a quarterly basis. All emerging or significant risks will be communicated to OSPI's contract manager within 48 hours, accompanied by a detailed mitigation plan.

Data security and confidentiality risks will be managed by employing industry-standard encryption, secure file-sharing protocols, and role-based access controls across all platforms. All data collected, stored, or shared during the project will comply with FERPA and OSPI data governance policies. NORC's Information Security Officer will

oversee the implementation of these measures, and any data breach will be reported immediately following standard compliance protocols.

The NORC infrastructure framework is compliant with the Federal Information Security Management Act (FISMA) to ensure that all data, operations, and assets are protected from security threats. As such, we follow the standards and guidelines set by the National Institute of Standards and Technology (NIST) Special Publication 800-53 rev 5 (Recommended Security Controls for Federal Information Systems and Organizations) at the Moderate level. Our standard process includes the use of Federal Information Processing Standard (FIPS) 140-2 compliant encryption (Security Requirements for Cryptographic Module, as amended) to protect all instances of personally identifiable information (PII) and other sensitive information during storage and transmission. Regular audits have found that our systems meet or exceed the applicable requirements, which also include periodic site reviews to confirm compliance. For the transfer and storage of data, NORC utilizes the NIST 800-53 cybersecurity standard and compliance framework at a Moderate level.

NORC maintains multiple federal and public agency information systems and completes security control assessments throughout the year to maintain the strictest compliant environment. At the application level, we enforce strict application security policies. Software logins are designed to use a specifically encrypted challenge/response technology as well as multi-factor authentication (MFA). All NORC applications protect against unauthorized access and restrict authorized access to the minimum necessary level. We administer the least privilege, password protected access rights to safeguard individual privacy information. There is also a time out security measure for sessions that are inactive for a given period of time. The least privilege data access model ensures that users have visibility only to the data for which they have been approved. All unique user credentials and associated permissions are subject to the controls and standards maintained by the Information Technology (IT) department. Passwords must be changed on a regular basis, in addition to meeting stringent requirements for length and complexity.

NORC will comply with the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. 1232g; 34 CFR Part 99) which outlines the regulations protecting the privacy of student education records. All employees and sub-contractors are required to take an annual training class that includes security awareness, data governance, and privacy rules. General HIPAA requirements are addressed during this training process and can be adapted to include FERPA. For transmission of any documents and data, we follow strict encryption standards both internally and externally. These rules and processes extend to the transfer and receipt of personally identifiable information (PII) and documents containing any other confidential data. Files are password protected and encrypted following FIPS 140-2 standards. Transfer of all data utilizes the NIST-800-53 security framework. PII protection and encryption process complies with the OMB Memorandum M-06-16. All remote access requires two-factor authentication and encrypted channels. Only secure, encrypted file transfers are used when exchanging files with clients and/or partners over the Internet using an approved mode of transport

like the secure file transfer protocol (SFTP). Laptop computers are provisioned with an automatic full disk encryption system to protect against loss of sensitive data should any of these machines be lost or stolen. All data are stored and transmitted on our private network and is secured as per our highest standard protocol. Alternative protocols can be implemented for any unique requirements.

For all data collected and maintained by NORC for this project, NORC will abide by Presidential Executive Order 13556 regarding Controlled Unclassified Information (CUI), National Archives and Records Administration (NARA) records retention policies and schedules. The infrastructure is compliant with NIST 800-53 and NIST 800-171. As such, NORC will not dispose of any records unless authorized. All data that currently resides on the NORC network is electronically backed up on a nightly basis. Any archived information is quickly retrievable. Only a limited number of NORC's IT personnel are authorized to request the retrieval of these data media. This retrieval process follows a strict identification and authorization procedure. NORC maintains a Disaster Recovery Plan as part of our standard operating procedure. Production systems can quickly be restored in a significant system outage, and normal operations can resume. Disposal of information will follow the guidelines set in NIST 800-88.

Upon completion of the contract, NORC will purge all information from our systems according to NIST SP 800-88, *Guidelines for Media Sanitization*, and provide documentation of sanitization to the CO and/or COR applicable.

An additional potential risk is the **transfer of TA from the previous provider** to NORC and the Washington-based team. NORC has established protocols in place to ensure a smooth and efficient transition. *Our standard process includes the use of Federal Information Processing Standard (FIPS) 140-2 compliant encryption (Security Requirements for Cryptographic Module, as amended) to protect all instances of personally identifiable information (PII) and other sensitive information during storage and transmission.*

Grantee misalignment and resistance to change will be minimized through deliberate and transparent communication strategies and effective grantee engagement protocols. The Advisory Council, grantee surveys, and listening sessions will serve as feedback mechanisms to identify concerns and co-develop solutions that enhance buy-in and alignment.

Grounded in a deep understanding of Washington's priorities and grantee landscape, this performance framework provides OSPI with a clear, strategic pathway for achieving both near-term goals and long-term transformation. The NORC team brings nationally recognized expertise, durable infrastructure, and a proven implementation methodology that ensures every contractual deliverable is met with excellence. More importantly, this system enables Washington's 21st CCLC sites to take ownership of their improvement journeys. Through precision-aligned metrics, dynamic dashboards, and real-time feedback mechanisms, OSPI can proactively monitor progress, uphold program fidelity, and guide innovation at scale. This integrated approach builds local

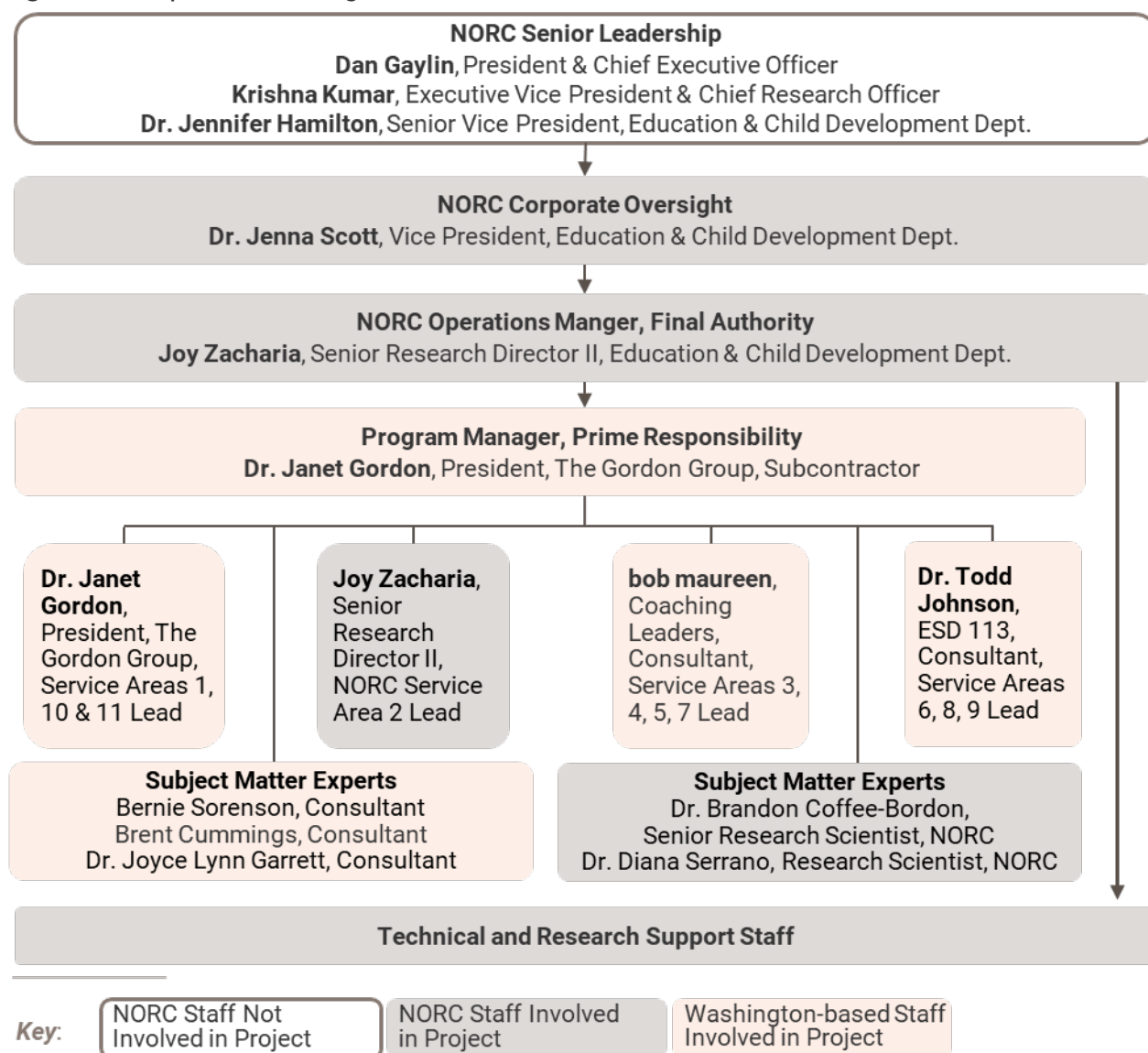
accountability while reinforcing coherence, transparency, and excellence statewide. NORC's infrastructure and long-standing commitment to capacity-building ensure that Washington's QIS system will not only succeed today but also remain resilient and effective well into the future.

3. Management Proposal

Project Management/Team Structure/Internal Controls

The commitment of NORC to strong project planning and management is just as important as the technical and programmatic expertise offered by our team. The project team's depth and prior collaborations allow us to handle multiple tasks without any loss of quality. With over 600 research staff, NORC has the depth and breadth of employees to handle many tasks simultaneously. We adhere to a management structure that builds on an existing collaborative relationship to facilitate clear and direct communication and group solving across the entire project. The NORC team includes experts in 21st Century Program Quality, Technical Assistance, Professional Development and Training, Event Logistics, Program Evaluation and Project Management. Work with OSPI will be led by Operations Manager Zacharia (NORC) and Project Manager Gordon (the Gordon Group). Ms. Zacharia and Dr. Gordon will be supported by Service Area Leads and Subject Matter Experts (SME) consisting of NORC staff and External Consultants as well as skilled research and technical staff. Figure 7 illustrates how the project team is organized.

Figure 7. Proposed Staffing Plan



Project Leadership and Oversight.



Janet Gordon, Ed. D.

Janet, *Project Manager and Service Lead for System Development & Oversight and Research and Reporting (The Gordon Group)* will lead Service Areas 1, 10 and 11. With three decades of experience in educational evaluation, strategic planning, and technical assistance, she brings deep familiarity with federal and state systems, including a longstanding focus on Washington's 21st CCLC program. She is known for her ability to build performance management systems that support continuous improvement and measurable results. Dr. Gordon will contribute 50% of her time to the project.



Joy Zacharia, MA

Joy, *Operations Manager and Logistics Service Lead (NORC)*, will lead overall project management, coordination, and client engagement. A Senior Research Director II at NORC with more than 30 years of experience, Joy has directed multi-site, mixed-method evaluations in early childhood, K-12, higher education, and OST settings. Her expertise in building evaluation capacity, providing technical assistance, and managing complex partnerships ensures high-quality, timely, and responsive project delivery. Ms. Zacharia will contribute 150 hours (8%) to the project.



Jenna Scott, PhD

Jenna, Vice President of Education & Child Development at NORC, brings over 20 years of experience leading technical assistance projects and evaluations for federal, state, and private-sector clients. A trained mixed-methods sociologist, she specializes in culturally responsive evaluation and capacity-building frameworks, addressing key issues such as educator quality, school improvement, college readiness, human capital systems, and equity-informed strategic planning. Presently, she works with the state of Maryland on its strategic plan for education, including OST programs and initiatives. Prior to joining NORC, she led education portfolios at Abt Global, managed U.S. Department of Education programs at Westat, and contributed to federal program evaluations at the U.S. Government Accountability Office. Dr. Scott will donate her time to the project. Dr. Scott will contribute 48 hours (1%) to the project.

Functional Area Leads.



bob maureen

bob, *Training and Coaching Lead (Independent Consultant)*, will oversee Service Areas 3, 4, 5, and 7. With decades of experience supporting statewide 21st CCLC programs in Washington and across the country, she brings deep expertise in leadership coaching, quality improvement, and compliance. As a Certified Professional Coach and former YPQA tool designer, she helps teams build capacity for long-term, sustainable improvement. Ms. maureen will contribute 281 hours (15%) to the project.



Todd Johnson, PhD

Todd, *Advisory Council Lead (Independent Consultant)*, will lead Service Areas 6, 8, and 9. He brings over 20 years of experience in program evaluation, continuous quality improvement, and technical assistance, with a strong focus on educational systems, youth development, and behavioral health. His leadership of advisory infrastructure will ensure strategic integration of local knowledge, research, and policy. Dr. Johnson will contribute 281 hours (15%) to the project.

Subject Matter Experts and Key Contributors.



Joyce Lynn Garrett, PhD

Joyce, an experienced educator and evaluator, will support curriculum development, grant writing, and strategic planning. Her strengths lie in environmental education, Indigenous consultation, and capacity-building for educators and site leaders. Dr. Garrett will contribute 150 hours (8%) to the project.



Brent Cummings

Brent, a seasoned community leader with more than 20 years of experience in expanded learning and family engagement, will contribute his expertise in strategic partnerships, program design, and community outreach. As a former 21st CCLC director and Afterschool Ambassador, Brent specializes in aligning 21st CCLC principles across birth-to-five and K–12 systems. Mr. Cummings will contribute 94 hours (5%) to the project.



Bernie Sorenson, MS

Bernie, an equity-centered systems coach and former SEA and district administrator, will support internal team development and systems alignment. With expertise in facilitation, collective leadership, and continuous improvement, Bernie is trained in PLCs, Critical Friends Groups, and the Six Conditions Framework, and helps organizations

create conditions for collaborative, high-impact change. Ms. Sorenson will contribute 187 hours (10%) to the project.



Brandon Coffee-Borden, PhD

Brandon, a Senior Research Scientist at NORC, brings 17 years of experience evaluating systems change and place-based initiatives. He offers expertise in trauma-informed practices, equity-centered evaluation, and building cross-sector networks that promote resilience and sustainable community impact. Dr. Coffee-Borden will contribute 24 hours (1%) to the project.



Diana Serrano, PhD

Diana is a bilingual Research Scientist at NORC with deep expertise in mixed-methods research and outcomes measurement. Her focus on culturally and linguistically diverse populations, combined with her background in teaching and program evaluation, ensures that reporting and data analysis are meaningful, accurate, and actionable. Dr. Serrano will contribute 56 hours (3%) to the project.

Project Management Best Practices. The NORC team has developed a set of project management best practices that are effective and will ensure an orderly administration of the 21st CCLC Program Quality and TA work. These include maintaining a detailed work plan, schedule of deliverables, cost and production reports, budget control processes, and processes for problem resolution. Combined with disciplined budget monitoring, these approaches have consistently enabled NORC to successfully manage large, complex studies and to produce high-quality deliverables on time and within budget. These tools will also ensure that NORC delivers a comprehensive workplan that enables consistent and timely reporting on the progress of all workstreams.

- **Project Timeline.** A well-maintained project timeline is critical to effective project management. To ensure the work runs smoothly and efficiently, we will develop a detailed project timeline that includes all workplan activities and identifies the staff responsible for each component of the work. Following OSPI's approval of the initial schedule, the NORC project team will expand the schedule to include trackable milestones to mitigate the risk of scheduling issues and ensure that all milestones are met on time. Using Microsoft Project, the NORC team will regularly monitor the

schedule, assess where adjustments need to be made, evaluate the implications of any changes, and immediately communicate any potential modifications to OSPI.

- **Budget Control Processes.** NORC's robust financial monitoring system provides macro-, task-, and person-level detail in terms of planned and actual spending. NORC will staff the work with financial analysts who will support the Operations Manager in monitoring and forecasting costs. The financial analyst will ensure that all accounting procedures and established standards for cost estimation are followed, while Ms. Zacharia will provide detailed knowledge of the tasks, schedule, and costs. The Costpoint system is project-oriented software that accumulates costs by project. Costs can be segregated by task, activity, type of expense, and department. The Costpoint System is also used to maintain NORC's basic accounting records, including both general and project ledgers. Anticipated expenditures that exceed budget are immediately reflected as negative variances of the project's bottom line. Using this system, NORC can produce timely and informative cost reports. FocusPoint is a software tool designed for use by professional services firms whose employees are assigned to multiple projects. The system provides an accurate and timely picture of incurred costs and a systematic way to relate those costs to a particular task or subtask. In addition, to these two programs, NORC financial analysts track all project costs, develop cost projections, prepare financial reports, and analyze financial data throughout the life of the project. Our accounting procedures include interdepartmental reviews and internal controls to ensure that all charges to a project are valid, allowable, and authorized within the scope of the project.

Project Communication. Our overall communication philosophy is one that fosters open and continuous communication with grantees and integrates feedback into the project on an ongoing basis. NORC team members will communicate with one another, with the sub-contractor, with consultants, and with grantees through emails and telephone/video conversations. Communication among team members will be both structured (e.g., through regularly scheduled meetings) and open (e.g., through informal conversations among the project team). NORC will schedule meetings at least quarterly or "as needed" with staff on this project. These meetings will serve as an open forum for staff to discuss progress, with particular emphasis on actual or anticipated problems or concerns.

Problem Identification and Resolution. Our technical approach and management plan are designed to anticipate and address potential problems before beginning project activities; however, unanticipated problems may arise. NORC's approach to problem resolution is to handle problems expeditiously and effectively without compromising schedule or quality. Key attributes of this approach are: (1) developing and using early warning procedures or systems appropriate to each project to spot problems when they first arise; (2) bringing appropriate project team expertise to bear in identifying and assessing the trade-offs among a range of possible solutions; and (3) rapidly implementing the optimal solutions after consultation with key grantees. This problem resolution approach will facilitate cost-effective and timely conduct of all project activities.

Ensuring Timely Completion of Project Activities. The NORC team has developed a detailed work schedule that includes proposed key dates and project milestones. If the project is funded, the team will collaborate with OSPI leadership to refine the schedule as needed. Operations Manager oversight and internal communication structures will ensure project coherence. Each project task will be assigned adequate staffing to deliver on-time products. NORC's management plan tracks project timelines to ensure project deliverables are dispatched in a timely fashion. A key to our success is the careful planning and coordination of team members who work concurrently to produce one seamlessly integrated product. The NORC team recognizes that projects evolve and often require mid-course corrections. In cases where a potential delay or challenge emerges, the NORC team and the Operations Manager will work closely with OSPI to ensure that interruptions do not affect the achievement of key project goals and milestones.

Data Security. Data security is a critical element of any project. NORC has developed a multi-tiered approach to data management that includes protocols for managing various issues surrounding the computerized storage of data, files, and programs. Recent audits confirm our systems meet or exceed government standards and regulations. NORC will store all electronic project files and programs within its secure servers. Access to both physical, electronic, and confidential data is restricted to employees and project team members with proper authorizations and need to view or use saved data. The most sensitive data (such as names and addresses of project participants) are the most carefully protected, with internal access severely limited. NORC offers a SFTP (Secure File Transfer Protocol) to securely manage and transfer files over a network. NORC will follow standard practices of hard-copy management as specified by the National Institute of Standards and Technology, Health Insurance Portability and Accountability Act, and other relevant security directives, laws, and regulations. NORC is in full compliance with NIST 800.53 standards used by government agencies for federal contracts and grants. No data will be released or retained without OSPI's written approval.

Security Training. NORC staff must complete required security trainings annually. All 21st CCLC project team members who will handle confidential data, files, or programs are required will be required complete security trainings as well so can access necessary data sources, including non-public information. The content of training workshops includes best practices for protecting data from unauthorized sources, proper data handling procedures, records management; respondent rights and confidentiality; data use agreements; and security protocols. NORC diligently upholds the provisions established under the Privacy Act of 1974 (5 U.S.C. 552a); Privacy Act Regulations (34 CFR Part 5b), Section 308(d) of the Public Health Service Act (42 U.S.C. 242m); and requirements of the NORC Institutional Review Board (IRB). NORC's approach to confidentiality and security includes training through all project activities and processes, including using secured information management systems with the least privilege access rules. It also includes the completion of any required Data Use Agreements (DUA) between OSPI and NORC.

Quality Assurance and Control Plans. NORC's internal Contracts and Grants Office will work closely with OSPI's Procurements and Grants Office to ensure that all contractual requirements are met and that contract modifications are thoroughly addressed and documented. NORC's Contracts and Grants Office will work closely with Ms. Zacharia to assign the proper cost accounting and monitoring mechanisms for each task. As stated above, NORC's accounting system has financial controls that comply with U.S. federal regulations and meet government standards for accumulating and reporting project-related costs. Accounting procedures also include internal controls to ensure that all charges are valid, allowable, and authorized under the project.

NORC's quality assurance practices consistently ensures that all deliverables and services are of the highest quality. Our goal for any analytic work is to produce files and output that are readily understood and reproducible, establishing that analytic work can be repeated to achieve the same output. Analytic codes are annotated to allow for efficient review by analysts assigned to quality assurance (QA) work. NORC tracks all versions of code utilized in analysis to maintain reproducibility and transparency. This aides in the QA process because a log of all code edits can be easily accessed to identify any sources of error.

For all deliverables, staff use a series of automated and manual reviews of systems, reports, and data files to limit errors during data collection, compilation, analysis, and reporting. Raw data and any analytic files are checked by two-person teams to confirm accuracy. If errors are found at any point in QA, or if there is any variation from the expected result, NORC retraces steps to locate the first occurrence of the error and then repeats all QA steps in order.

In addition, to quantitative safeguards and best practices, NORC has established a systematic approach to QA written deliverables, including professional substantive editing and copyediting, 508 review, incorporating client feedback, rigorous internal review processes, and final signoff. This multi-level approach to review and editing allows for in-depth and detailed review of every deliverable. Finally, project teams are resourced and supported by NORC's Quality Program. This program's quality management system sets forth quality principles, establishes quality standards and best practices, and guides each NORC project to develop a quality/risk accountability matrix. This tool helps teams identify, quantify, and mitigate risks to quality and establishes accountability for quality assurance consistent with NORC's principles and standards.

Risk Mitigation. NORC will proactively anticipate and mitigate any challenges that emerge over the course of the project. NORC's management tools and communication procedures ensure that any challenge will be quickly identified, diagnosed, and dealt with. NORC's risk management approach, informed by decades of experience running hundreds of complex mixed-methods research projects, has three key features:

- **Documented record of project changes and decisions.** NORC will maintain a process for recording and storing decisions and actions made during the project to ensure that all parties understand key decisions, actions, and any proposed changes

to deliverable plans, protocols, and schedules. Any proposed changes will be reviewed and approved by NORC's service leads and OSPI. This will ensure that all relevant parties carefully consider the changes' impact on project quality, schedule, and resources.

- **Automated and manual checks/reviews of systems, reports, and data files.** Our data review policy is built on an early and iterative review process. Representatives from different components of a project (service leaders, research staff, technical staff) will be involved in reviewing deliverables.
- **Financial data monitoring.** We will monitor project expenditures at both corporate and individual levels and carefully review any deviations from projected spending. On a regular basis, Ms. Zacharia will estimate the cost to complete the remaining tasks and deliverables, and those costs will be compared to expenditures to date and the overall project budget.

Experience of the Consultants/Staff/Subcontractors

Relevant Experience

Our team brings together an exceptional collection of expertise specifically aligned with 21st Century Community Learning Centers programming, evaluation, and systems improvement. Led by Dr. Janet Gordon as the primary subcontractor, our team combines decades of specialized experience in program evaluation, implementation, professional development, and stakeholder engagement to deliver comprehensive services that exceed both minimum and desired qualifications.

Dr. Janet Gordon, Subcontractor, serves as the cornerstone of our team with over 30 years of demonstrated excellence in leading evaluation and strategic planning for federally- and state-funded education and technical assistance programs. Dr. Gordon's deep specialization in 21st Century Community Learning Centers spans over 20 years, during which she has served as the program evaluator for 21st CCLC grantees in North Central Washington. As a reliable rater, she has developed substantial expertise in building the capacity of 21st CCLC grantees to establish and maintain effective Quality Improvement Systems (QIS), directly aligning with the continuous improvement focus essential for successful contract performance. Her experience extends to the national level through her support of the 21st CCLC National Technical Assistance Center (NTAC), which serves grantees across the United States, ensuring she brings current best practices and comprehensive understanding of program implementation challenges and solutions to Washington State's unique context.

Dr. Gordon has cultivated strong, trusting relationships with key stakeholders including the Washington State Office of Superintendent of Public Instruction (OSPI), Educational Service Districts (ESDs), Tribal Nations, and school districts throughout the state. Her volunteer service on the OSPI Washington State Advisory Council demonstrates her commitment to collaborative decision-making and policy guidance. Additionally, her

work with the American Institutes for Research (AIR) to share knowledge and guide state-level decisions showcases her ability to translate research into actionable policy recommendations. Her regional leadership experience includes playing a pivotal role in facilitating continuous improvement within the U.S. Department of Education Region 16 Comprehensive Center, which serves Washington, Oregon, and Alaska.

Ms. Joy Zacharia, MA, NORC, brings specialized expertise as an external evaluator with direct experience in 21st Century Community Learning Center programs in New York City and East St. Louis. She has utilized mixed methods approaches to collect and compile qualitative and quantitative data for program assessment, implementation evaluation, and outcomes measurement. Her experience includes designing comprehensive evaluation frameworks that address federal and state reporting requirements while producing actionable annual local evaluation reports with implementation progress analysis and program improvement recommendations. Ms. Zacharia has consistently demonstrated excellence in managing all aspects of evaluation projects including design, data collection and analysis, staffing, budget management, and client communication while ensuring deliverables are completed on time, within budget, and of high quality. Her additional experience evaluating Department of Education-funded Full-Service Community School projects in New York City and Vancouver provides valuable insight into comprehensive wraparound programming models that complement 21st CCLC initiatives.

Ms. Bernie Sorenson, MS, Consultant, contributes extensive leadership experience spanning multiple dimensions of 21st Century Community Learning Centers implementation and systems support. As a former director and site leader of 21st CCLC programs, Sorenson successfully led district-wide programming design and implementation for Juneau School District, including the innovative CARES (Credit Achievement, Recovery, and Employability Skills) initiative for at-risk high school students that became a statewide model. Through her role as Region 16 Comprehensive Center Director, she provided technical assistance and capacity-building support to 21st CCLC programs across Alaska, Washington, and Oregon, facilitating multi-state learning communities and strategic convenings focused on educational equity and culturally sustaining practices. Her comprehensive understanding of federal program coordination, gained through roles as Federal Programs Coordinator and Title I Coordinator, provides deep expertise in program compliance, resource alignment, and integration of federally funded initiatives with broader school improvement goals.

Dr. Todd Johnson, Consultant, brings over 25 years of research, evaluation, and data-informed technical assistance experience across education, behavioral health, and youth development sectors. As Director of Research and Data Analysis at Capital Region ESD 113, Dr. Johnson has managed cross-sector evaluation portfolios for federally and state-funded programs, including multi-year engagements supporting 21st Century Community Learning Centers, Systems of Care, and youth prevention initiatives. His methodological expertise spans mixed-methods research, longitudinal impact analysis, and fidelity monitoring, while his leadership has included developing

performance dashboards, leading professional development in data use, and supporting local teams in implementing site-specific Quality Improvement Plans. Dr. Johnson's contributions consistently prioritize equity-centered data interpretation, actionable insights, and integration of metrics into decision-making systems.

Dr. Joyce Lynn Garrett, Consultant, contributes over 50 years of curriculum development and educational leadership experience, having created her first curriculum in 1972 and continuing to develop innovative educational programming throughout her career. Her extensive background includes curriculum development for school-aged students and adults across multiple subject areas, with particular expertise in outdoor and environmental education, tribal consultation, and specialized instructional modules. Her experience developing grant writing and strategic planning workshops for foundations, non-profits, and colleges provides valuable insight into sustainable program development and resource acquisition strategies essential for 21st CCLC programming success.

Ms. bob maureen, Consultant, brings direct Washington State 21st CCLC implementation experience, having served as Grant Director for four years of a 21st CCLC grant while supporting OSPI's coaches and trainer cadre for four years. As a Certified Trainer on every Weikart Center tool, bob provides deep technical expertise in quality programming approaches essential for effective 21st CCLC implementation. Her historical understanding of what Washington State 21st CCLCs have experienced since 2007 offers valuable institutional knowledge and continuity. bob currently provides professional development to current 21st CCLC grantees and youth development agencies throughout Washington State, maintaining active connections with the field and current implementation challenges and opportunities.

Dr. Brandon Coffee-Borden, contributes specialized expertise in systems change evaluation and multi-sector initiative assessment. He led a demonstration project designed to build organizational capacity for using systems change approaches, focusing on staging evaluation questions, methods, and analysis for comprehensive storytelling-oriented evaluation of complex initiatives. His work included teaching teams about systems change approaches to planning and evaluation, including systems mapping of local contexts. Brandon currently serves as project manager for the Blueprint for Maryland's Future, where his team assesses the progress of implementation for multi-sector, multi-level initiatives designed to improve college and career readiness among students. This experience in complex, multi-stakeholder evaluation aligns directly with the collaborative nature of 21st CCLC programming and the need for comprehensive assessment approaches.

Mr. Brent Cummings, Consultant, offers extensive direct 21st Century Community Learning Centers program leadership experience, having served as Program Director for Walla Walla Public Schools from 2013-2021. During his tenure, he oversaw the full lifecycle of four federally funded 21st CCLC grants totaling \$9.1 million, including authoring successful grant proposals for Cohorts 10, 14, 15, and 18. His comprehensive responsibilities included staff hiring and supervision, budget management, compliance

monitoring with federal and state program requirements, and program effectiveness evaluation through both qualitative and quantitative measures. Brent led development of hands-on, project-based enrichment activities aligned with state learning standards while offering comprehensive family literacy and engagement opportunities. His innovative contributions include initiating Washington State's first-ever joint student and educator afterschool conference (DO Conference), which received statewide recognition for its participatory model, and creating STEM initiatives that garnered national attention through his appointment as an Afterschool Ambassador by the Afterschool Alliance (2014-2015). As Director of Accelerated Learning & Support (2021-2022), he continued oversight of 21st CCLC programs as part of COVID-19 academic recovery planning, ensuring compliance with OSPI reporting requirements and promoting equity in program access and participation.

Dr. Diana Serrano brings specialized research expertise as a Research Scientist in NORC's education and child development department. As a bilingual and bicultural applied researcher based in Portland, Oregon, she provides advanced training in quantitative statistical methodology and qualitative methods, with particular expertise in research-practice partnerships, outcomes measurement, and data-driven decision-making. For 10 years, Dr. Serrano has collaborated with university, local, and state-level partners to build organizational capacity and support evidence-based decision-making in the nonprofit sector. Her extensive teaching experience includes working with adult learners in the United States, K-12 students in Germany and China, and children aged 6 months to 10 years in dual language immersion programs, providing practical classroom insights that inform her research approach. Dr. Serrano's work focuses on linguistically and culturally diverse populations, employing experimental and quasi-experimental designs to assess program effectiveness and inform policy decisions. Currently serving as Principal Investigator on multiple projects, she leads an impact evaluation with Denver Public Schools assessing curriculum effectiveness for English learners in improving literacy, math, and socioemotional outcomes. Her additional work includes conducting mixed-method evaluations examining childcare access in Massachusetts and developing curricular math materials with language supports for sixth-grade English language learners, demonstrating her ability to bridge research and practical program implementation.

Our team structure ensures comprehensive coverage of all aspects of 21st CCLC programming, evaluation, and technical assistance needs. The team affirms that all minimum qualifications outlined in the solicitation are met and exceeded, as evidenced by the extensive experience and expertise detailed above. Please see Appendix A for staff resumes.

Related Contracts

Table 16 includes a sample of contracts the team has had during the last five year that relate to NORC's ability to perform the services needed under this RFP.

Table 16. Related Contracts

Team Member	Contract Reference Number	Contract period of performance	Contact name	Phone number	Email address
NORC	9590.01.62 – Birth to Five Illinois	November 2022 – May 30, 2024	Cicely Fleming	309-233-0430	cfleming@birthtofiveil.com
	No Reference Number Assigned: Youth Empowerment Services (YES)	2015 -2024	Brenda Waters	210-735-2341	bwaters@yeseep.org
	9566.01.62 – Delaware Department of Education (Career and Technical Education and Equity and Innovation Offices)	January 2022 – May 30, 2024	Dr. Michael Hill-Shaner Monique Martin	Dr. Hill-Shaner: 302- 857-3381 Martin: N/A	Dr. Hill-Shaner: michael.hill-shaner@doe.k12.de.us Martin: monique.martin@doe.k12.de.us
	G348 – Education Northwest Evaluation	October 2022 – September 2027	Ashley Sheppard or Mary Padden	Ashley: 503-275-9497 Mary: 503-275-9559	Ashley.Sheppard@ednw.org Mary.Padden@ednw.org
	No Reference Number Assigned: Evaluation of the Safety and Justice Challenge	2021-Present	Julian Williams, Evaluation and Learning Officer, MacArthur Foundation	312-348-5567	jwilliams@macfound.org
	No Reference Number Assigned: Evaluation of FE Cities	2024-2025	Nicky Grist, Chief of Research, Evaluation, and Finance, Cities for Financial Empowerment Fund	646-362-1638	ngrist@cfefund.org

Team Member	Contract Reference Number	Contract period of performance	Contact name	Phone number	Email address
	No Reference Number Assigned: Diverse Health Sciences Workforce Landscape Assessment	2022-2025	Tara Gonzales Hacker, Director, Impact Learning & Evaluation, Health Forward Foundation	816-242-0706 ext. 1024	tgonzaleshacker@healthforward.org
Janet Gordon	No Reference Number Assigned: program evaluation	2023-current	Jena Gooch, Director	509-630-8097	JGooch@orondo.wednet.edu
	No Reference Number Assigned: Program evaluation	2023-current	Rachel Suits, Director	509-637-0167	Rachel.suits@whitesalmonschools.org
	CFDA#84.283B PR/Award#S283B19005	2019-2024	Esley Newton, Education Program Specialist US Dept of Education OESE	202-296-4242	esley.newton@ed.gov
bob maureen	No Reference Number Assigned: QIS support for 21st CCLC	2007-current	Heidi Schultz	360-725-6049	Heidi.schultz@k12.wa.us
	No Reference Number Assigned: Ongoing Professional Development for her staff	2009-current	Kim Hogue	360-270-8663	Khogue@linkprogram.org
	No Reference Number Assigned: OCF Annual Convenings	2017-current	Celeste Janssen	503-517-8990	Celeste.janssen@oregonstate.edu

Team Member	Contract Reference Number	Contract period of performance	Contact name	Phone number	Email address
Todd Johnson	No Reference Number Assigned: Evaluations	On-Going	Shawn Batstone	425-413-3400	sbatstone@tahomasd.us
	No Reference Number Assigned: Evaluation/Grants	On-Going	Dr. Michael Pavel	360-490-0561	michaelpavel@outlook.com
	No Reference Number Assigned: Evaluations	On-Going	Quinton Roman Nose	580-791-1694	qromannose@tedna.org
Joyce Lynn Garrett	No Reference Number Assigned:	2/15-7/25 2025	Hanna Coffman	509-686-5656	hcoffman@bsd75.org
	No Reference Number Assigned:	4/1-Ongoing (on consignment)	Fartun Weli	952-564-1131	fartun.weli@isuroon.org
	No Reference Number Assigned:	9/1-9/30 2024	Suzanne McFarland-Price	541-740-0346	s.mcfarlandprice@lblestd.k12.or.us
Bernie Sorenson	CFDA#84.283B PR/Award#S283B190059	2019 - 2024	Carmen Xiomara Urbina, former Deputy Director of Education – Oregon Department of Education and Current Chief of Staff for the 4J School District, Eugene, OR.	541-510-0302	urbina_c@4j.lane.edu
				541-790-7730	

Team Member	Contract Reference Number	Contract period of performance	Contact name	Phone number	Email address
	CFDA#84.283B PR/Award#S283B190059	2019 - 2024	Henry Strom, Assistant Superintendent of Native Education, OSPI	360-918-3953	henry.strom@k12.wa.us
	CFDA#84.283B PR/Award#S283B190059	2019 - 2024	Anthony Craig, Director of Leadership for Learning (EdD) program at the University of Washington	425-760-7378	acraig@uw.edu

References

References are included for the NORC team as well as for our subcontractor and several consultants.

Reference #1 (NORC):

- Cicely Fleming, State Director, Birth to Five Illinois
- Phone: (773) 739-2107
- Address: 550 W. Madison, Ste 1000, Chicago, IL 60661
- Email: cfleming@birthtofiveil.com
- Type of service provided: technical assistance: thought leadership, implementation planning, customized professional learning, strategic action planning

Reference #2 (Janet Gordon):

- Dr. Gene Sharratt, past President, Association of Educational Service Districts
- Phone: (509) 670-3222
- Email: Genesharratt@outlook.com
- Type of service provided: evaluation and research studies, capacity building of schools for 21st CCLC, ESD information systems

Reference #3 (bob maureen):

- Celeste Janssen, OCF Annual Convenings
- Phone: (503) 577-3830
- Email: Celeste.janssen@oregonstate.edu
- Type of service provided: facilitator and emcee for statewide grantee convenings

Reference #4 (Todd Johnson):

- Quinton Roman Nose, Tribal Education Departments National Assembly (TEDNA)
- Address: 309 NW 13th St. Ste #103, Oklahoma City, OK 73103
- Phone: (580) 791-1694
- Email: qromannose@tedna.org
- Type of service provided: evaluating and providing strategic support for a federal capacity-building project that strengthens tribal education agencies and departments

Past Performance

NORC has not received notification of contract breach in the past five (5) years.

Examples/Samples of Related Projects/Previous Work

Examples of related projects/previous work are provided in Appendix B. Examples include:

- Sample 1. Early Childhood Development Action Network (ECDAN)
<https://ecdan.org/session7-event/>
<https://ecdan.org/systems-masterclass/>
- Sample 2. AmeriCorps
[Logic Model Slides_April 2023_final.pptx](#)
[Peer learning memo_11.02.22.docx](#)
[Task 6_Recommendations_June2022.docx](#)
- Sample 3. Region 16 Comprehensive Center Year 3 Impact Story, Alaska
[Impact Story](#)
- Sample 4. COHORT LEARNING: Strengthening Support for Native Education in Washington [Impact Story](#)

Subcontractor

Dr. Janet Gordon and Dr. Todd Johnson are currently program evaluators for several grantees in eastern and western Washington.

Subcontractor/Consultants

- 1. Dr. Janet Gordon
The Gordon Group
905 Cooper Gulch Rd, Manson, WA. 98831
P: (509) 860-5273
E: 10janetgordon@gmail.com
- 2. Bernie Sorenson, MS
Sorenson Leadership and Organizational Coaching & Consulting
154 Yellow Brick Road, Sequim, WA 98382
P: (907) 321-2598
E: sorensoncoachingandconsulting@gmail.com
- 3. bob maureen
Coaching Leaders Group
2803 W Sinto Ave, Spokane, WA 99201
P: (509) 220-2607
E: bob@wearecoachingleaders.com

4. Brent Cummings
Wala Wala Public Schools
1150 W. Chestnut, Walla Walla, WA 99362
P: (509) 526-1769
E: bcummings@wwps.org
5. Dr. Joyce Lynn Garrett
Independent Consultant
5362 W. Ferndale Road, Milton-Freewater, OR. 97862
P: (541) 447-7800
E: joycelynngarrett@outlook.com
6. Dr. Todd Johnson
Capital Region ESD 113
6005 Tyee Dr SW Tumwater, WA 98512
P: (360)464-6740
E: TJohnson@esd113.org

4. Cost Proposal

Identification of Costs

Tables 17 and 18 show a fully detailed budget including all costs for performing the services necessary to accomplish the objectives of the Contract. The budget includes staff costs, administrative costs, travel costs, and other expenses necessary to accomplish the tasks and to produce the deliverables under the Contract.

NORC costs are budgeted at \$89,769 for Year 1 and \$103,865 for Year 2.

Travel Costs

Travel costs are budgeted at \$8,604 for Year 1 and \$8,469 for Year 2.

Sub Costs

Subcontractor costs are budgeted at \$176,624 for Year 1 and \$162,523 for Year 2.

Indirect Costs

Per OSPI's indirect costs policy, the maximum amount that may be charged or included in contracts is the following: 10%. All indirect costs are accounted for in NORC's labor costs. There are no separate indirect costs.

Table 17. Detailed Budget by Project Year
21stCCLC Program Quality and Technical Assistance
Summary by Project Year
2025-30

BUDGET SUMMARY	Project Period 1		Project Period 2	
	September 01, 2025 - August 31, 2026		September 01, 2026 - August 31, 2027	
	Hours	Cost	Hours	Cost
Regular On-Site Staff				
Zacharia,Joy M	72.00	19,923	78.00	22,416
Serrano,Diana	24.00	4,493	32.00	6,218
Research Associate I	150.00	15,536	150.00	16,098
Sr Financial Analyst	48.00	5,976	50.00	6,454
Rumper,Brooke M	40.00	7,344	24.00	4,573
Taylor,Alicia M	25.00	3,109	-	-
Desktop Publisher	4.00	901	68.00	15,897
Software Engineer	4.00	730	4.00	758
Coffee-Borden,Brandon W	8.00	1,922	16.00	3,992
Subtotal Regular On-Site Staff	375.00	\$ 59,934	422.00	\$ 76,405
TOTAL DIRECT LABOR	375.00	\$ 59,934	422.00	\$ 76,405
TOTAL LABOR COSTS		\$ 59,934		\$ 76,405
Travel & ODCs				
Travel and Expense		8,604		8,469
Venue Rental and Associated Costs		22,848		20,160
Subcontractor #1 - The Gordan Group*		82,880		85,120
Subcontractor #2 - Consultants*		82,544		71,019
Subcontractor #3 - WA-based Logistics Coordinator*		7,280		6,384
Subcontractor #4 - WA-based Graphic Designer*		3,920		-
Handling Charge on all Subcontractors, Equipment, and				
Respondent Fees *		6,358		5,851
Provision for Inflation (* is excluded)		629		1,449
Subtotal Travel & ODCs		\$ 215,063		\$ 198,452
TOTAL NON-LABOR COSTS		\$ 215,063		\$ 198,452
TOTAL ESTIMATED COSTS		\$ 274,997		\$ 274,857

Table 18. Detailed Budget Across Project Years

**21stCCLC Program Quality and Technical Assistance
Summary by Project Year
2025-30**

BUDGET SUMMARY	TOTAL	
	September 01, 2025 - August 31, 2027	
	Hours	Cost
Regular On-Site Staff		
Zacharia,Joy M	150.00	42,339
Serrano,Diana	56.00	10,712
Research Associate I	300.00	31,634
Sr Financial Analyst	98.00	12,430
Rumper,Brooke M	64.00	11,918
Taylor,Alicia M	25.00	3,109
Desktop Publisher	72.00	16,798
Software Engineer	8.00	1,487
Coffee-Borden,Brandon W	24.00	5,914
Subtotal Regular On-Site Staff	797.00	\$ 136,339
TOTAL DIRECT LABOR	797.00	\$ 136,339
TOTAL LABOR COSTS		\$ 136,339
Travel & ODCs		
Travel and Expense		17,073
Venue Rental and Associated Costs		43,008
Subcontractor #1 - The Gordan Group*		168,000
Subcontractor #2 - Consultants*		153,563
Subcontractor #3 - WA-based Logistics Coordinator*		13,664
Subcontractor #4 - WA-based Graphic Designer*		3,920
Handling Charge on all Subcontractors, Equipment, and		
Respondent Fees *		12,209
Provision for Inflation (* is excluded)		2,078
Subtotal Travel & ODCs		\$ 413,515
TOTAL NON-LABOR COSTS		\$ 413,515
TOTAL ESTIMATED COSTS		\$ 549,854

Budget Justification

Summary

NORC is proposing a Fixed Price bid in the amount of **\$549,854** to perform activities as outlined in the scope provided to the State of Washington, Office of Superintendent of Public Instruction (OSPI) to provide continued support for the Washington's 21st Century Community Learning Centers (21st CCLC) to ensure fidelity of implementation, accelerate data-informed practices, and build durable local capacity across the state. The expected period of performance for all tasks will occur between September 1, 2025 and August 31, 2026 (Project Year 1) and September 1, 2026 and August 31, 2027 (Project Year 2).

Year 1 Timeline	Amount (\$)
Quarter 1 (Sept-Nov)	\$68,749.25
Quarter 2 (Dec-Feb)	\$68,749.25
Quarter 3 (Mar-May)	\$68,749.25
Quarter 4 (June-Aug)	\$68,749.25

Year 2 Timeline	Amount (\$)
Quarter 1 (Sept-Nov)	\$68,714.24
Quarter 2 (Dec-Feb)	\$68,714.24
Quarter 3 (Mar-May)	\$68,714.24
Quarter 4 (June-Aug)	\$68,714.24

NORC Personnel

Joy Zacharia will serve as the Operations Manager and the Lead for Service Area 2. In this role, she will oversee all event planning and logistical coordination to ensure the seamless execution of both virtual and in-person convenings. Using a systems-oriented and service-focused approach, she will lead the development and implementation of event infrastructure including venue selection, vendor coordination, and audiovisual needs. Ms. Zacharia will manage the pdEnroller platform for registration, attendance tracking, and professional development documentation, ensuring all events are accessible, well-structured, and aligned with OSPI's objectives. She will also create event task lists, coordinate evaluation surveys, and maintain close communication with

OSPI to ensure timely progress reporting, risk mitigation, and responsiveness to evolving needs. Her level of effort is 8%.

Project Year	Amount (\$)
Year 1	\$19,923
Project Year	Amount (\$)
Year 2	\$22,416

Diana Serrano will serve as a subject matter expert supporting all data collection, research, and reporting activities related to the implementation and evaluation of the Quality Improvement System (QIS). Her responsibilities include gathering and cleaning data from multiple sources, supporting the preparation of evaluation deliverables, and assisting in the analysis of program outcomes to inform continuous improvement. Her level of effort is 3%.

Project Year	Amount (\$)
Year 1	\$4,493
Project Year	Amount (\$)
Year 2	\$6,218

Brandon Coffee-Borden will serve as a subject matter expert supporting curriculum development, data analysis, and reporting. He will ensure that training content, coaching frameworks, and evaluation deliverables are aligned with evidence-based practices and OSPI's programmatic goals. His level of effort is 1%.

Project Year	Amount (\$)
Year 1	\$1,922
Project Year	Amount (\$)
Year 2	\$3,992

Brooke Rumper will support the development and maintenance of the project's data dashboard, ensuring that site-level and aggregate data are accessible and accurately visualized for use by grantees, OSPI, and project leadership. She will collaborate with technical and evaluation teams to ensure dashboard content aligns with QIS metrics and reporting needs. Her level of effort is 3%.

Project Year	Amount (\$)
Year 1	\$7,344
Project Year	Amount (\$)
Year 2	\$4,573

Alicia Taylor will contribute to the qualitative data analysis and reporting components of the project, including coding focus group transcripts, identifying emerging themes, and supporting the integration of qualitative findings into evaluation reports and presentations to OSPI and other stakeholders. Her level of effort is 1%.

Project Year	Amount (\$)
Year 1	\$3,109
Project Year	Amount (\$)
Year 2	\$0

Jenna Scott, Vice President of Education & Child Development at NORC, will donate her time to provide corporate oversight for the project. Her oversight will help ensure the project maintains methodological rigor, aligns with best practices in the field, and advances high standards of accountability and impact throughout implementation. Her level of effort is 1%.

Project Year	Amount (\$)
Year 1	\$0
Project Year	Amount (\$)
Year 2	\$0

The Research Associate I will provide cross-functional support for event logistics, data collection, research, reporting, and the development of the project newsletter. This role ensures alignment between program implementation and data reporting, contributes to the analysis of training participation and coaching activities, and assists in drafting and distributing stakeholder communications. Their level of effort is 16%.

Project Year	Amount (\$)
Year 1	\$15,536
Project Year	Amount (\$)
Year 2	\$16,098

Sr. Financial Analyst will assist with tracking and forecasting project costs and will prepare financial data for monthly reports. They will use NORC's project cost accounting system, which provides close monitoring and forecasting of costs and deviating from budget and emphasizes accountability. Their level of effort is 5%.

Project Year	Amount (\$)
Year 1	\$5,976
Project Year	Amount (\$)
Year 2	\$6,454

The Desktop Publisher Team will provide formatting and design support for project newsletters and data dashboards. This includes producing visually engaging and accessible materials that clearly communicate findings, updates, and key messages to grantees, Advisory Council members, and OSPI staff. Their level of effort is 4%.

Project Year	Amount (\$)
Year 1	\$901
Project Year	Amount (\$)
Year 2	\$15,897

The Software Engineer will support the back end and front-end development of the QIS data dashboard. This includes designing user-friendly interfaces, integrating various data sources, and ensuring the platform is secure, functional, and meets OSPI's data reporting needs. Their level of effort is 1%.

Project Year	Amount (\$)
Year 1	\$730
Project Year	Amount (\$)
Year 2	\$758

Subcontractors

The Gordon Group

Dr. Janet Gordon will serve as the Project Manager, dedicating at least 20 hours per week to oversee the implementation of the Quality Improvement System (QIS) in collaboration with the Office of Superintendent of Public Instruction (OSPI). She will lead project communications, fiscal oversight, interagency coordination, and facilitate monthly meetings with OSPI to monitor progress, assess risks, and shape the project's strategic direction. Working closely with NORC's Operations Manager, she will ensure timely and high-quality delivery of project activities by managing staff assignments, aligning resources with project needs, and co-leading budget planning and tracking. Dr. Gordon will also guide the development of the annual events calendar and collaborate with a diverse team of partners and subject matter experts to co-design capacity-building efforts, technical assistance, and data-informed decision-making tools to support statewide 21st CCLC program improvement and sustainability. Dr. Gordon will also Lead Service Areas 1, 10, and 11.

Project Year	Amount (\$)
Year 1	\$82,880
Project Year	Amount (\$)
Year 2	\$85,120

WA-based small business Graphic Designer

A specialized subcontractor will be engaged to oversee the design and review of all event materials and newsletters to ensure they are fully compliant with Section 508 accessibility standards. This includes reviewing layout, color contrast, readability, tagging screen readers, and other accessibility requirements. This role is critical to ensuring that all communications and materials are inclusive and accessible to diverse audiences, in alignment with federal and state guidelines.

Project Year	Amount (\$)
Year 1	\$3,920
Project Year	Amount (\$)
Year 2	\$0

WA-based Logistics Coordinator

A Washington-based event coordinator will be subcontracted to provide on-the-ground support for all in-person convenings. This individual will attend each event and coordinate with venues, catering, AV providers, and other vendors to ensure seamless execution. Their presence ensures that all logistics are managed efficiently and aligned with the needs of OSPI and project stakeholders.

Project Year	Amount (\$)
Year 1	\$7,280
Project Year	Amount (\$)
Year 2	\$6,384

Below is a description of each consultant's role. The cost for each consultant by project year is also included following the descriptions.

bob maureen

bob maureen will oversee Service Areas 3, 4, 5, and 7. bob will also be meeting with coaches on a monthly basis as they work with grantees to implement with fidelity the QIS Instrument and processes. bob will serve as a key member of our Advisory Council and the 21st CCLS events.

Todd Johnson

Todd Johnson will lead Service Areas 6, 8, and 9. Todd will develop Advisory Council meeting agendas and ensure insights gained from meetings are related to the research team and lead to actionable insights. He will oversee work with first-year grantees including orientation to QIS, pdEnroller, supports and processes.

Joyce Lynn Garrett

Joyce Lynn Garrett will serve as a subject matter expert and curriculum developer to develop custom, localized modules to replace the generic Leadership Practice Series.

Bernie Sorenson

Bernie Sorenson will serve as a subject matter expert and systems facilitator to create a career path and passion to serve in the 21st CCLC.

Brent Cummings

Brent Cummings will serve as a subject matter expert and will support Todd Johnson in leading Service Area 8, the Summer Learning Days design, workshop facilitation, and grantee coordination in close conversation with OSPI and the Advisory Council.

Other Coaches

The coaches will work with the grantees and provide coaching, training, and support to implement the QIS with fidelity. They will also attend select 21st CCLC events.

Consultant	Amount (\$)	
	Project Year 1	Project Year 2
bob maureen	\$ 33,320.00	\$ 33,320.00
Todd Johnson	\$ 11,508.00	\$ 11,508.00
Joyce Lynn Garrett	\$ 4,536.00	\$ 403.20
Bernie Sorenson	\$ 2,100.00	\$ 2,100.00
Brent Cummings	\$ 3,024.00	\$ 3,024.00
Other Coaches	\$ 28,056.00	\$ 20,664.00
Total	\$ 82,544.00	\$ 71,019.20

Deliverables Summary

Deliverables/Performance Measure/Outcome Payment Schedule

Quarter	Deliverable/Performance Measure/Outcome	Payment Schedule	Payment Amount
Year 1 Quarter 1 (Sept-Nov 25)	• SWOT report and gap analysis matrix, 12% - \$8,249.91 • 25% of event summary reports, 12% - \$8,249.91 • 25% of newsletters, 12% - \$8,249.91 • 25% of pdEnroller reports, 5% - \$3,437.46 • 25% of coaching check-ins, 5% - \$3,437.46 • First quarter progress report, 12% - \$8,249.91 • Grantee calendar, 5% - \$3,437.46 • Data dashboard 50% complete, 12% - \$8,249.91 • 50% of modules, 5% - \$3,437.46 • Train pdEnroller users; enter 50% of the courses, 5% - \$3,437.46 • Quarter 1 events, 10% - \$6,874.93 • 100% of members are successfully recruited; 1st council is held, 5% - \$3,437.46	December 31, 2025	\$68,749.25
Year 1 Quarter 2 (Dec-Feb 26)	• 50% of event summary reports, 12% - \$8,249.91 • 50% of newsletters, 12% - \$8,249.91 • 50% of pdEnroller reports, 5% - \$3,437.46 • 50% of coaching check-ins, 5% - \$3,437.46 • Second quarter progress report, 12% - \$8,249.91 • Quarter 2 updates to calendar, 5% - \$3,437.46 • Quarter 2 updates to dashboard, 12% - \$8,249.91 • 100% of modules, 10% - \$6,874.93 • Enter 100% of the courses, 10% - \$6,874.93 • Quarter 2 events, 12% - \$8,249.91 • 2nd Advisory Council is held, 5% - \$3,437.46	March 31, 2026	\$68,749.25

Quarter	Deliverable/Performance Measure/Outcome	Payment Schedule	Payment Amount
Year 1 Quarter 3 (Mar-May 26)	• 75% of event summary reports, 15% - \$10,312.39 • 75% of newsletters, 15% - \$10,312.39 • 75% of pdEnroller reports, 6% - \$4,124.96 • 75% of coaching check-ins, 6% - \$4,124.96 • Third quarter progress report, 15% - \$10,312.39 • Quarter 3 updates to calendar, 7% - \$4,812.45 • Quarter 3 updates to dashboard, 15% - \$10,312.39 • Quarter 3 events, 15% - \$10,312.39 • 3rd and final Advisory Council is held, 6% - \$4,124.96	June 30, 2026	\$68,749.25
Year 1 Quarter 4 (June-Aug 26)	• 100% of event summary reports, 15% - \$10,312.39 • 100% of newsletters, 15% - \$10,312.39 • 100% of pdEnroller reports, 9% - \$6,187.43 • 100% of coaching check-ins, 9% - \$6,187.43 • Fourth quarter progress report, 15% - \$10,312.39 • Quarter 4 updates to calendar if needed, 7% - \$4,812.45 • Quarter 4 updates to dashboard, 15% - \$10,312.39 • Quarter 4 events, 15% - \$10,312.39	September 30, 2026	\$68,749.25
Year 2 Quarter 1 (Sept-Nov 26)	• 25% of event summary reports, 12% - \$8,245.71 • 25% of newsletters, 12% - \$8,245.71 • 25% of pdEnroller reports, 5% - \$3,435.71 • 25% of coaching check-ins, 5% - \$3,435.71 • First quarter progress report, 12% - \$8,245.71 • Grantee calendar, 5% - \$3,435.71 • Data dashboard, 12% - \$8,245.71 • 50% of modules, 10% - \$6,871.42 • Train pdEnroller users; enter 50% of the courses, 10% - \$6,871.42 • Quarter 1 events, 12% - \$8,245.71 • 100% of members are successfully recruited; 1st council is held, 5% - \$3,435.71	December 31, 2026	\$68,714.24

Quarter	Deliverable/Performance Measure/Outcome	Payment Schedule	Payment Amount
Year 2 Quarter 2 (Dec-Feb 27)	• 50% of event summary reports, 12% - \$8,245.71 • 50% of newsletters, 12% - \$8,245.71 • 50% of pdEnroller reports, 5% - \$3,435.71 • 50% of coaching check-ins, 5% - \$3,435.71 • Second quarter progress report, 12% - \$8,245.71 • Quarter 2 updates to calendar, 5% - \$3,435.71 • Quarter 2 updates to dashboard, 12% - \$8,245.71 • 100% of modules, 10% - \$6,871.42 • Enter 100% of the courses, 10% - \$6,871.42 • Quarter 2 events, 12% - \$8,245.71 • 2nd Advisory Council is held, 5% - \$3,435.71	March 31, 2027	\$68,714.24
Year 2 Quarter 3 (Mar-May 27)	• 75% of event summary reports, 15% - \$10,307.14 • 75% of newsletters, 15% - \$10,307.14 • 75% of pdEnroller reports, 6% - \$4,122.85 • 75% of coaching check-ins, 6% - \$4,122.85 • Third quarter progress report, 15% - \$10,307.14 • Quarter 3 updates to calendar, 7% - \$4,810.00 • Quarter 3 updates to dashboard, 15% - \$10,307.14 • Quarter 3 events, 15% - \$10,307.14 • 3rd and final Advisory Council is held, 6% - \$4,122.85	June 30, 2027	\$68,714.24
Year 2 Quarter 4 (June-Aug 27)	• 100% of event summary reports, 15% - \$10,307.14 • 100% of newsletters, 15% - \$10,307.14 • 100% of pdEnroller reports, 9% - \$6,184.28 • 100% of coaching check-ins, 9% - \$6,184.28 • Fourth quarter progress report, 15% - \$10,307.14 • Quarter 4 updates to calendar if needed, 7% - \$4,810.00 • Quarter 4 updates to dashboard, 15% - \$10,307.14 • Quarter 4 events, 15% - \$10,307.14	September 30, 2027	\$68,714.24

Quarter	Deliverable/Performance Measure/Outcome	Payment Schedule	Payment Amount
Year 1 Total			\$274,997
Year 2 Total			\$274,857
Overall Total			\$549,854

Deliverable 1: SWOT Report, including gap analysis matrix

In the first year, a comprehensive SWOT Report with an integrated gap analysis matrix will be developed to identify current strengths, weaknesses, opportunities, and threats within the 21st CCLC system. This report will be grounded in qualitative and quantitative data gathered through focus groups and a statewide grantee survey.

Deliverable 2: Event Summary Reports

Event Summary Reports will be prepared following each professional development convening to document key outcomes, participant feedback, and insights that inform continuous improvement of the Quality Improvement System (QIS). These reports will include registration and attendance data, summaries of key decisions and action items, feedback on content and facilitation, and emerging themes from participant surveys. Developed within six business days after each event, the reports will be shared with OSPI and Advisory Council members to support timely reflection and data-informed planning. By capturing both quantitative and qualitative findings, Event Summary Reports will play a critical role in aligning future events with grantee needs, improving facilitation strategies, and reinforcing a responsive, equity-centered approach to statewide technical assistance.

Deliverable 3: Newsletters

Project newsletters will serve as a key communication tool to inform stakeholders—including grantees, regional consultants, and OSPI staff—about upcoming events, training opportunities, program updates, and emerging best practices in out-of-school time programming. The NORC team will design, produce, and disseminate newsletters on a regular schedule, ensuring content is concise, relevant, and actionable. Each edition will highlight recent accomplishments, spotlight exemplary program practices, and provide guidance on using quality improvement tools and resources. The newsletters will be distributed via email and posted to shared platforms to maximize accessibility and engagement.

Deliverable 4: pdEnroller Coaching Reports

pdEnroller Coaching Reports will be developed to track participation in professional development activities, coaching sessions, and quality improvement supports across the state. These tailored reports will extract data from the pdEnroller system, displaying information by district, school, participant name and role, and session completion status. The reports will support OSPI and grantees in monitoring engagement, identifying gaps, and using data for continuous quality improvement. The NORC team will collaborate with OSPI to ensure these reports are aligned with SmartSheets and other data systems for seamless integration and ongoing updates.

Deliverable 5: Coaching Check-ins

A distributed network of coaches will support new grantees (10) delivering QIS implementation assistance. These coaches will be supported by bob maureen who will lead the coaches learning community. Support will be personalized, aligned to QIS expectations, and continuously informed by real-time data and site feedback.

Deliverable 6: Quarterly Progress Reports

The project team will deliver quarterly progress reports which will report progress on deliverables, milestones, budget, quality control, and risk mitigation.

Deliverable 7: Calendar

The Calendar deliverable will serve as a central organizing tool for all QIS-related capacity-building events, ensuring grantees have timely access to training, technical assistance, and key milestones. The calendar will be updated regularly to reflect new opportunities and adjustments, supporting ongoing engagement and smooth coordination across the statewide 21st CCLC network.

Deliverable 8: Data Dashboard

NORC will manage a centralized QIS dashboard that integrates performance indicators, coaching feedback, SEL PQA results, and training participation. This infrastructure enables OSPI to monitor fidelity, identify trends, and guide resource allocation. Data-informed TA cycles will drive transparency and ensure accountability across all levels of implementation.

Deliverable 9: Curriculum Materials

This deliverable will include a customized leadership development curriculum designed to meet the specific needs of Washington's 21st CCLC program leaders—network leads, program directors, site coordinators, and quality coordinators. The curriculum will focus on building core competencies in quality implementation, system leadership, and strategic improvement. A central feature will be the Career Pathways module and accompanying posters, which provide a clear, visual framework for understanding and navigating professional growth within the expanded learning field.

Deliverable 10: Utilize existing tech infrastructure

The project team will leverage pdEnroller, Washington's statewide platform for professional development registration and tracking, to streamline access to training opportunities for 21st CCLC grantees. The system's integration with Smartsheets will support the creation of real-time dashboards that track staff engagement, training milestones, and overall compliance.

Deliverable 11: Event Planning (virtual and in-person)

The NORC team, led by Joy Zacharia, will oversee all aspects of event planning and execution—including attendee registration for both virtual and in-person events—to ensure that convenings are aligned with OSPI’s goals and operate seamlessly. All registration will be managed through pdEnroller, allowing for streamlined participant tracking and integration with other reporting tools. For virtual events, platforms such as Zoom or Microsoft Teams will be used to support accessible and interactive participation, with NORC handling agenda development, presenter coordination, registration, technical support, and evaluation surveys. To support in-person convenings, NORC will subcontract a Washington-based event coordinator who will attend all events and serve as the on-site logistics lead, coordinating directly with venues and vendors to ensure smooth delivery. All in-person events will be hosted at local community colleges or school district facilities—an approach that is both cost-effective and aligned with our commitment to investing in and partnering with Washington communities.

Deliverable 12: Professional Learning Advisory Council

In Project Year 1, the Advisory Council will be established as a key component of the QIS, beginning with a transparent recruitment and selection process to identify up to twelve diverse members from current and former 21st CCLC grantees. The Council will convene quarterly to review implementation data, co-develop professional learning strategies, and provide practitioner-informed feedback to OSPI and the implementation team. In Project Year 2, the Advisory Council will continue meeting quarterly, using insights from coaching reports, training participation, and site-level data to refine statewide supports. Ongoing communication, including regular newsletters and updates, will maintain engagement and foster a continuous learning environment between formal convenings.

Other Direct Costs

Venue Rental and Associated Costs

Funds allocated under this line item will cover costs associated with hosting in-person events at local community colleges and school district facilities throughout Washington State. These costs may include venue rental fees, furniture setup, audio-visual equipment, and materials preparation. This approach ensures events are accessible, cost-effective, and grounded in trusted community spaces, aligning with the project’s commitment to local investment and fiscal responsibility. \$22,848 has been budgeted for Year 1 and \$20,160 for Year 2.

Travel & Expense

The travel costs are estimated as follows:

Year 1: \$8,604

Internal Planning Meeting for OSPI, NORC, WA Leaders: NORC has budgeted for two non-local staff to attend an internal planning meeting in WA.

Description	Amount
Airfare: \$605 Roundtrip *1 trip * 1 staff	\$1,210
Hotel: \$393/night * 2 nights * 1 trip *2 staff	\$1,573
Per Diem: \$123/day * 2.5 days * 1 trip * 2 staff	\$618
Mileage: \$134* 1 trip * 2 staff	\$269
Total Costs	\$3,670

Planning with Data Event: NORC has budgeted for one local staff to attend Planning with Data event in Vancouver.

Description	Amount
Airfare: N/A	\$0
Hotel: N/A	\$0
Per Diem: \$123/day * .75 days * 1 trips * 1 staff	\$93
Mileage: \$134* 1 trip * 1 staff	\$134
Total Costs	\$227

Consultant Travel Reimbursement: NORC will reimburse consultant Bernie Sorenson for her mileage and hotel to attend Planning with Data event.

Description	Amount
Airfare: \$605 Roundtrip *1 trip * 1 staff	\$605
Hotel: \$393/night * 3 nights * 1 trip *1 staff	\$1,180
Per Diem: N/A	\$0
Mileage: \$134* 1 trip * 1 staff	\$134
Total Costs	\$1,919

Coach Travel Reimbursement: NORC will reimburse three Coaches (TBD) for their mileage and hotel to attend coaching sessions.

Description	Amount
Airfare: N/A	\$0
Hotel: \$333/night * 1 night * 1 trip *3 staff	\$1,000
Per Diem: N/A	\$0
Mileage: \$0.94/mi* 300 miles * 1 trip * 3 staff	\$847
Total Costs	\$1,847

Logistics Coordinator Travel Reimbursement: NORC will reimburse one Logistics Coordinator (TBD) for their mileage and to attend in-person events for grantees, program evaluators, directors, and site coordinators.

Description	Amount
Airfare: N/A	\$0
Hotel: N/A	\$0
Per Diem: N/A	\$0
Mileage: \$134 * 7 trips * 1 staff	\$941
Total Costs	\$941

Year 2: \$8,469

Internal Planning Meeting for OSPI, NORC, WA Leaders: NORC has budgeted for two non-local staff to attend an internal planning meeting in WA.

Description	Amount
Airfare: \$605 Roundtrip *1 trip * 1 staff	\$1,210
Hotel: \$393/night * 2 nights * 1 trip *2 staff	\$1,573
Per Diem: \$123/day * 2.5 days * 1 trip * 2 staff	\$618
Mileage: \$134* 1 trip * 2 staff	\$269
Total Costs	\$3,670

Planning meeting with Data: NORC has budgeted for one local staff to attend a planning meeting with Data in Vancouver.

Description	Amount
Airfare: N/A	\$0
Hotel: N/A	\$0
Per Diem: \$123/day * .75 days * 1 trips * 1 staff	\$93
Mileage: \$134* 1 trip * 1 staff	\$134
Total Costs	\$227

Consultant Travel Reimbursement: NORC will reimburse consultant Bernie Sorenson for her mileage and hotel to attend the Planning with Data event.

Description	Amount
Airfare: \$605 Roundtrip *1 trip * 1 staff	\$605
Hotel: \$393/night * 3 nights * 1 trip *1 staff	\$1,180
Per Diem: N/A	\$0
Mileage: \$134* 1 trip * 1 staff	\$134
Total Costs	\$1,919

Coach Travel Reimbursement: NORC will reimburse three Coaches (TBD) for their mileage and hotel to attend coaching sessions.

Description	Amount
Airfare: N/A	\$0
Hotel: \$333/night * 1 night * 1 trip *3 staff	\$1,000
Per Diem: N/A	\$0
Mileage: \$0.94/mi * 300 miles * 1 trip * 3 staff	\$847
Total Costs	\$1,847

Logistics Coordinator Travel Reimbursement: NORC will reimburse one Logistics Coordinator (TBD) for their mileage and to attend in-person events for grantees, program evaluators, directors, and site coordinators.

Description	Amount
Airfare: N/A	\$0
Hotel: N/A	\$0
Per Diem: N/A	\$0
Mileage: \$941 * 6trips * 1 staff	\$806
Total Costs	\$806

Handling Charge on Subcontractors, Equipment and Respondent Fees

The Handling Charge is a service center charge and is applied on a percentage basis (3.0%) to the total value of any direct cost for subcontractors, equipment and respondent fees and includes the portion of accounting, contact administration and business development costs that are attributable to the management of these types of transactions. \$6,358 has been budgeted for Year 1 and \$5,851 for Year 2.

Provision for Inflation Cost

Inflation is a direct allowable cost on non-labor costs NORC estimates on proposal budgets. It is only realized when it becomes billable, as inflation is reflected in the increases in other direct costs over time. The 3.0% inflationary escalator is derived from a consideration of inflationary factors in the overall U.S economy and market factors affecting other direct costs. In its budgeting protocol, NORC utilizes the same weighted methodology taking into consideration the timing effects of when future costs will be incurred. NORC uses a traditional approach in calculating its inflationary escalator in which for multi-year projects, the inflationary escalator is compounded in the time series for the budget period. NORC's weighted methodology takes into consideration when the cost is anticipated to be incurred and factors this time sequence into an adjusted inflationary escalator. For budgets spanning more than one calendar year the inflationary escalator is prorated to calculate the appropriate escalation factor. \$629 has been budgeted for Year 1 and \$1,449 for Year 2.

References

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Hackman, J. R., & Wageman, R. (2005). A theory of team coaching. *Academy of Management Review*, 30(2), 269-287.

Kania, J., & Kramer, M. (2011). Collective impact. *Stanford Social Innovation Review*, 9(1), 36-41. <https://doi.org/10.48558/5900-KN19>

Schillemans, T., & Bjurstrøm, K. H. (2020). Trust and verification: Balancing agency and stewardship theory in the governance of agencies. *International Public Management Journal*, 23(5), 650-676.

Wageman, R., Nunes, D. A., Burruss, J. A., & Hackman, J. R. (2008). *Senior leadership teams: What it takes to make them great.* Harvard Business Review Press.

Appendix A: Resumes

Janet V. Gordon

Janet Gordon has been leading the evaluation and strategic planning of federally- and state-funded education and technical assistance (TA) programs for 30 years. She has a proven track record of excellence in performance management systems, evaluation, and collaborative work in teams to support successful implementation of systems and continuous improvement. She has a long lineage of teachers in her family and is passionate about Washington State's 21st Century Community Learning Centers (21st CCLC) program that provides crucial services to students and families. Janet played a pivotal role in facilitating continuous improvement within the US ED Region 16 Comprehensive Center in Washington, Oregon, and Alaska. She is focused on achieving tangible results and measurable impacts that are meaningful to federal, state and tribal agencies, students, families, and communities.

Professional Experience

Independent Evaluator/Researcher, 2004 - Present

Independent consultant focused on evaluation and research across the sciences (computer science, cybersecurity, STEM) and social sciences including 21st CCLC after-school programs, parent literacy, social/emotional development, formal education (primary, secondary, post-secondary), and teacher professional development. Evaluations focused on summative and formative action-oriented information for quality improvement. Performs comprehensive studies to achieve evidence-based effectiveness. Experienced in diverse communities including Native American, Pacific Islander, and Latine communities. SEL PQA certified.

Abt Global, LLC.

Principle Associate, 2004 - 2025

Provided support to the 21st CCLC National Technical Assistance Center (NTAC); Program Director for the evaluation of the Region 16 Comprehensive Center; managed budgets, developed high performing work team, nurtured partnerships, held informative stakeholder and community meetings, produced high quality reports, developed data visualizations for diverse audiences, and mentored early career professionals.

Kauffman & Associates, Inc.

Vice President of Education Systems, 2015 – 2023

Strategic planning, oversight and management of education-related projects. Oversaw evaluation of Yakima Farm Workers 21st CCLC. Research and evaluation of national, regional, and state programs for institutions of higher education, state and federal agencies, and private foundations.

Senior Evaluator/Project Manager III

*Assistant to the Secretary of Program Evaluation, Washington
Lead researcher*

Education

**Doctorate of Education,
Curriculum & Instruction**
Montana State University

**M.S., Environmental
Science/Forestry**
Northern Arizona University

**B.S., Computer Information
Systems**
Arizona State University

Professional Affiliations

- *American Education Research Association (AERA)*
- *American Evaluation Association (AEA)*
- *Culturally Responsive Evaluation and Assessment (CREA)*
- *National Council of Measurement in Education (NCME)*
- *Washington Education Research Association (WERA)*

Recruitment and Retention of IHS Providers Research.

Tasks included environmental scan, case study in-depth interviews, qualitative narrative analysis, write up and presentation.

Department of the Interior

Assistant Secretary of Indian Affairs, Bureau of Indian Affairs, Bureau of Indian Education Strategic Workforce Plan Lead evaluator for strategic workforce plan for three agencies: AS-IA, BIA, and BIE.

Tasks involved working with large national datasets, new instrument development, in-depth interviews, correlation analysis, interpretation and write up of results.

Papers & Publications

- Nelson-Barber, S., Boxerman, J., Johnson, Z., and Gordon, J. V. (in press). *Culturewise Pathways to Values-Aligned Indigenous STEM Learning*. Springer Nature.
- Lobdell, G., Gordon, J. V., Steach, J., Sharratt, G., Myles, C., Bolz, E., and Rumsey, R. (2021). *Characteristics of Positive Outlier Schools: Illuminating the Strengths of American Indian/Alaska Native, Black, Latino/a, and Students Experiencing Poverty*. The Center for Educational Effectiveness. 88p.
- Redding, S., Gordon, J. V., Scott, J., Smoker-Broadus, M., Bitterman, A., and Maynor, P. (2021). *Resources to Advance Education for Native Students: Circles of Reflection*. National Comprehensive Center: Rockville, MD.
- Gordon, J. V. (2016). *A path to reduce inequities in evaluation: Indigenous evaluation in tribal colleges*. Center for Culturally Responsive Evaluation & Assessment Conference, April 20-22, 2016.
- LaFrance, J., Nelson-Barber, S., Rechebei, E., & Gordon, J.V. (2014). *Partnering with Pacific Communities to Ground Evaluation in Local Culture and Context: Promises and Challenges*. In *Continuing the Journey to Reposition Culture and Cultural Context in Evaluation Theory and Practice* (Editors Greene, J. & Donaldson, S.). Stafford Hood: University of Illinois, Champaign, IL.
- LaFrance, J., Nelson-Barber, S., & Gordon, J.V. (2014). *Spanning the Pacific: Decolonizing education and evaluation in Polynesia and Micronesia*. CREA Annual Conference, April 2013, Chicago, IL.
- Gordon, J. V., Downey, J. & Bangert, A. (2013). *Effects of a school-based mentoring program on student behavior and measures of adolescent connectedness*. *School Community Journal*, 23(2).
- Kipp, G., Quinn, P., Gordon, J., & Sharratt, G. (2012). *The AWSP Leadership Framework: The Eight New Principal Evaluation Criteria*. Olympia, WA. www.awsp.org/evaluation
- Gordon, J. V. & Angotti, R. (2012). *Teaching mathematics to the Net Generation: Promising strategies in a technology-rich mathematics classroom*. AERA Annual Conference, April 2012, Vancouver, B.C.
- Gordon, J. V. (2008). *Performance on Large-Scale Science Tests: Item Attributes That May Impact Student Achievement Scores*. Dissertation Montana State University.
- "Using data to make connections with students." 2008 Spring Professional Development Series, March 14, 2008, Joyce, WA.
- "What do you do with all that data? A model for data analysis that works." Success by Design, 2006 AWSP/WASA Summer Conference, June 25-27, 2006, Spokane, WA.
- "Meaningful use of data: A software and professional development partnership." Breakthroughs in Leadership 2006 Summer Leadership Conference, August 15-16, Bremerton, WA.
- "Effects of question format on the 2005 8th grade science WASL scores." CLTW Spring Research Forum, April 19-21, 2006, Ft. Collins, CO.
- "Investigating science teachers' conceptual growth & change in online learning environments." Preside over multiple paper set, National Association for Research in Science Teaching 2004 Conference, April 1-4, 2004, Vancouver, B.C.

Joy Zacharia

Senior Research Director II

Joy Zacharia is a Senior Research Director II at NORC in the Education and Child Development Department. Ms. Zacharia has more than 30 years of experience conducting research and evaluation projects in numerous content areas including P-12 education, higher education, teacher preparation programs, STEM, child welfare/well-being, youth development, arts education and engagement, school integration and educational equity, and community impact and partnership programs. As a Senior Research Director at NORC, Ms. Zacharia directs a range of evaluation projects and research studies in the areas of education and child development. She has advanced knowledge of the principles, processes, and methods of social science research and has expertise in project management, program evaluation and research, and relationship management.

NORC Experience (Selected)

The Mayor's Office for NYC Opportunity's Crisis Systems Management System Program Evaluation

Project Director, 2024 – Present

NORC partners with the Department of Youth and Community Development and NYC Opportunity to evaluate the CMS, a program that promotes public safety and neighborhood rebuilding using the Cure Violence approach to combating violence in high-risk neighborhoods. This evaluation includes site visits to a select number of sites to interview staff and program participants; interviews with wrap-around providers, a staff survey, and an analysis of program data.

The Mayor's Office for NYC Opportunity's NeON Works Program Evaluation

Project Director, 2023 – 2025

This culturally responsive and equitable evaluation includes the development and convening of a Participatory Advisory Council comprising NeON Works participants and staff. The Council provides crucial input into co-creating the evaluation framework, designing instruments, and analyzing and interpreting data. The evaluation also includes surveys; site visits; as well as interviews with partner leaders.

Fulton County School District's NAESP Mentor Leaders Evaluation and Cost Study

Project Director, 2023 – 2024

This evaluation and cost study consisted of a comparative analysis of two principal leadership programs using qualitative focus groups with school leader mentors and their mentees alongside an economic evaluation of program costs to determine which program to maintain and how to improve future implementation.

Education

M.A., Psych. Measurement & Evaluation

New York University, New York

B.A., Psychology

State University of New York College at Oswego, New York

Expertise

Project Management

- Project Planning
- Workplan Development
- Budget Management
- Staff Coordination
- Client Relations

Program Evaluation & Research Studies

- Evaluation/Research Design
- Instrument Design and Administration
- Data Collection and Analysis
- Reporting and Sharing Results

The Writing Revolution Program Evaluation

Project Manager, 2023 – 2025

NORC in partnership with TWR, a nonprofit organization dedicated to enhancing K-12 students' writing skills by training teachers, is working with the Monroe City School District in Louisiana to explore how implementing the approach to literacy impacts teachers' leadership roles, retention, and career trajectories, as well as the program's impact on student literacy development and achievement. The evaluation consists of interviews with educators and leadership and an analysis of administrative data.

Parent Encouragement Program's Family Resilience Program Evaluation

Project Director, 2023 – Present

NORC crafted an evaluation approach that meets the multilingual needs and literacy levels of participating parents. Working closely with PEP, we developed a survey instrument that aligns with PEP's goals and draws upon existing, valid, and reliable scales from diverse parenting programs. We are also conducting rigorous psychometric and outcome analyses to provide a preliminary understanding of the program's effectiveness and identify reliable metrics for future use.

Professional History

NORC at the University of Chicago 2023 - Present

- *Senior Research Director II*

Metis Associates, NY, NY 1990-2023

- *Senior Research Associate, 2000-2023*
- *Research Associate, Research Assistant II, Research Assistant, 1990-2000*

Prior Professional Experience

Metis Associates

Senior Research Associate, 2000-2023

In this role, Ms. Zacharia managed large-scale and multi-site evaluations; designed and conducted qualitative and quantitative research, including quasi-experimental and experimental designs; conducted fieldwork; analyzed data; summarized and reported results, including presenting findings to stakeholders and varied audiences; and facilitated training sessions in areas such as self-evaluation and research methods.

21st Century Community Learning Center Programs

Lead Evaluator, New York City and East St. Louis

These evaluations included mixed method designs to assess the implementation and impact of the out of school time programming. As the lead evaluator, Ms. Zacharia directed all evaluation related activities including client communication, data collection, data analysis, reporting, budgeting, and presentation of findings.

Full-Service Community Schools Grants

Project Director, United Federation of Teacher's in NYC and Vancouver Public Schools in Vancouver, Washington

These five-year DOE-funded evaluations include multiple methods to assess the implementation and impact of the full-service programming on students, adult family and community members, school staff, and project partners. As project director, Ms. Zacharia managed all aspects of the evaluations, including budgeting, staffing, client relations, data collection processes, instrument development, field work, writing reports for the client, and presenting findings to varied audiences.

Robert Noyce Teacher Scholarship Program Evaluations

Lead Evaluator, National Science Foundation's Noyce Scholars grant at Hofstra University, Long Island University, and Lehman College

Ms. Zacharia evaluated various STEM projects through her work on NSF's Phase I Teacher Scholarship program evaluations. For these five-year grants, she worked closely with university partners and staff at local high-needs school districts. The evaluations included the collection and analysis of various sources of qualitative and quantitative data from different respondent groups. A comparison design was also implemented to assess the extent to which outcomes differed between math and science scholars and non-scholars who majored in math or science.

Magnet School Assistance Program Grants

Lead Evaluator, Department of Education's Magnet Schools Assistance Program grants for NYC's Community School Districts 27 and 28 and a multi-district grant for Community School Districts 13/14/16

The evaluations have provided formative and summative feedback to support districts in creating new whole-school magnet programs that promote racial and ethnic diversity within and across schools and support improved academic outcomes for all students. For these projects, Ms. Zacharia facilitated project meetings, maintained project timelines and budgets, collaborated with program staff to develop evaluation tools, conducted observations and interviews during site visits, created IRB submissions which included the development of recruitment letters and consent forms, collected and analyzed qualitative and quantitative data, and developed summary of findings.

Arts Assistance in Education (AAE) and Arts in Education Model Documentation and Dissemination (AAEDD) grants

Lead Evaluator

Ms. Zacharia directed the evaluations of the Department of Education's Patchogue Arts Council AAE grant and Eastern Suffolk Board of Cooperative Education Services AAEDD grant. These evaluations assessed whether implementation of an arts-integration curriculum and professional development program led to improved educator and student outcomes. The AAEDD grant included a rigorous experimental evaluation design. As the lead evaluator, she worked closely with project partners to facilitate meetings, maintain project budget, develop evaluation tools, conduct interviews, create IRB submissions, collect and analyze qualitative and quantitative data, and develop summary of findings.

Bearing Witness™ Program Evaluation

Project Director

Bearing Witness™, a program funded by the Anti-Defamation League, provides Catholic school educators with training and resources to help their students understand the history of anti-Semitism, the Holocaust, and modern manifestations of prejudice. To determine how this experience impacted teachers and their students, virtual interviews were conducted with educators around the country.

Jenna Scott

Vice President, Education and Child Development

Experienced education evaluator, technical assistance provider, and policy expert working in areas across the cradle to career pipeline. Over ten years' experience overseeing large portfolios of evaluation and technical assistance work to ensure quality assurance. Skilled at navigating goals and priorities of clients while ensuring high-quality work to maintain timeliness and efficiency.

Professional Experience

Blueprint for Maryland's Future Interim Evaluation, NORC

Co-PI, 2025 - Present

The Blueprint for Maryland's Future (Blueprint) places Maryland at the forefront of efforts across the country to fundamentally transform how we educate and support students and families, with the goal of preparing students for long-term economic, health, and social success. NORC is partnering with the Accountability and Implementation Board to apply our deep experience and knowledge to the evaluation of this transformative initiative as part of the Blueprint for Maryland's Future Interim Evaluation.

Washington Statewide Family Engagement Center Project, NORC

Quality Assurance Oversight, 2024 – Present

The Washington Statewide Family Engagement Center (WASFEC) is a newly formed collaborative center in Washington state. The center monitors progress and compliance with federal regulations, assesses performance and implementation of its activities, and measures impacts on students and families. NORC is partnering with Education Northwest to independently evaluate family engagement programming and initiatives led by WASFEC.

Evaluation of the Regional Educational Laboratories, U.S. Department of Education (ED), Institute of Education Sciences (IES), Abt Global

Project Director, 2022 - 2024

Directed the congressionally mandated study, consisting of two implementation evaluations. One study descriptively examined the U.S. Department of Education's Regional Educational Laboratories program, while the second study descriptively examined the Comprehensive Center program. Ensured high quality deliverables, including those that are policy-relevant and actionable.

Racial Equity Action Leadership (REAL) Program, Leadership Montgomery (LM), Abt Global & Westat

Project Director, 2019 - 2024

Leadership Montgomery's REAL Program trains organizations, including school districts in Maryland, on how to incorporate racial equity in its strategic planning to create overarching system change. As a partner with LM, collaborated with participants on how to formatively and summatively evaluate their organizational racial equity.

Education

Ph.D., Cultural Foundation of Education (Sociology)

Syracuse University

M.A., Sociology (Quantitative Methods)

The Pennsylvania State University

B.A., Sociology & History (minor: Education)

Bucknell University

Expertise

Evaluation

- Over 15 years directing capacity building projects and evaluation studies
- Adept at communicating and disseminating report findings to stakeholders
- Expertise in collective impact models

Strategic Planning through an Equity Lens, Bainum Foundation, Westat*Project Director, 2021 – 2022*

The Bainum Foundation was committed to developing its strategic plan using a racial equity lens. Collaborated with the Bainum Foundation to develop a framework for the organization to use as it moves forward to ensure that racial equity is implemented and sustained in the organization.

The Region 14 Comprehensive Center, ED, Westat*Educator Effectiveness Portfolio Manager, 2019 - 2022*

The Comprehensive Center (CC) system builds the capacity of state education agencies (SEAs) to create solutions for addressing the high-leverage issues facing their states. These solutions are aimed at improving educational outcomes and closing achievement gaps by improving access to effective teachers and school leaders, continually improving the quality of instruction, and most effectively utilizing resources. The CC for Region 14 serves Arkansas, Louisiana, and Texas. For the project, managed the Region 14 CC work on educator effectiveness that focused on creating systems-level change. Example projects focused on human capital management, Grow Your Own educators, principal pipelines, diversifying the educator workforce, teacher leadership, culturally responsive and sustaining pedagogical practices, and educator evaluations.

National Comprehensive Center, ED, Westat*Project Lead, 2019-2021*

The National Comprehensive Center received funding to provide capacity building to State Education Agencies (SEAs) to help improve SEA strategies targeted to improve Indigenous students' outcomes. To meet this goal, the project worked to help SEAs better collaborate with Tribal Education Agencies and Local Education Agencies that serve a large percentage of Indigenous students. Through effective collaboration, the project helped SEAs co-create strategic plans to better support Indigenous students and communities.

Evaluation of the Implementation of Title I/II-A Program Initiatives, ED, IES, Westat*Content Expert, 2018–2019*

This study traced the implementation of ESEA, ESEA flexibility provisions, and the implementation of the Every Student Succeeds Act on state, district, and school policies and programs. Example tasks included meeting with the program office, establishing a Technical Working Group, preparing an OMB package, developing a sampling plan, collecting and analyzing data, and report writing.

Promise Neighborhoods Program Technical Assistance for Grant-Related Activities and Performance Data Collection, ED, Westat*Project Director, 2017 – 2018*

This project provided implementation and evaluation support to grantees across the early education through career pipeline. In addition to directing the project, led grantees with support on college readiness, access, and success strategies, including identifying evidence-based interventions and helping to develop an implementation and monitoring plan.

Professional History

**NORC at the University of Chicago
2024 - Present**

- Vice President

Abt Global

- Education Account Lead
2022 - 2024

Westat

- Principal Associate
2008 – 2015; 2016- 2022

Teacher Incentive Fund, ED, Westat*Director of Technical Assistance, 2016–2018*

This project provided technical assistance services to grantees in areas related to educator effectiveness. As part of this project, led the technical assistance and implementation of strategies and interventions. Worked with many school districts across the country, including multiple Florida districts. Liaisoned with the program office.

Student Scholarship Programs Evaluation, The National Oceanic and Atmospheric Administration, Insight Policy Research*Project Director, 2014–2016*

This project used a mixed-methods approach to provide NOAA's Office of Education with details about the Hollings Undergraduate Scholarship Program and the Educational Partnership Program alumni's academic experiences, attitudes, and career outcomes. Co-led the design and methodology for the project. Directed task leads, provided oversight, and conducted quality assurance.

Evaluation of the Advanced Technological Education (ATE) Program, National Science Foundation, Insight Policy Research*Co- Principal Investigator, 2015–2016*

This mixed-methods study assessed the ATE program. The ATE program is designed to educate highly qualified science and engineering technicians in strategic advanced technology fields; improve technical skills and general science, technology, engineering, and math preparation of technicians and educators; and increase capacity of institutions for advanced technician education. Led the qualitative design, analysis, and reporting.

Merit Review: Assessment of Investigator and Reviewer Experiences Program, National Science Foundation, Insight Policy Research*Qualitative Lead, 2015–2016*

This project used a mixed-methods approach incorporating data collection and analysis of quantitative and qualitative data to provide NSF with a comprehensive study of the merit review system and its pilots. Led the qualitative design, analysis, and reporting.

Performance Evaluation Reform Act Research-Based Study, Illinois State Board of Education, Westat*Project Director, 2013–2015*

The study focused on evaluating the Illinois' educator evaluation system. In addition to directing the study, led survey and interview protocol development, analyses, and report writing.

Publications

Finster, M., Beatson, C., & Scott, J. (2022). *Moving toward talent management system alignment: Eight steps to increase coherence among talent policies and practices*. Rockville, MD: Region 14 Comprehensive Center at Westat.

Finster, M., Beatson, C., & Scott, J. (2022). *Talent management alignment workbook: An introduction*. Rockville, MD: Region 14 Comprehensive Center at Westat: A multimedia resource.

Murthy, C., Scott, J., & Lewis, L. (2019). *Interventions for equity in college access and success* (for U.S. Department of Education). Washington, DC.

Scott, J. (2017). *Cultural relevancy resources for Promise Neighborhoods grantees* (for U.S. Department of Education). Washington, DC.

Scott, J., and Wolfson, M. (2017). *Broward county public schools' cultural competency initiative* (for U.S. Department of Education). Washington, DC.

Kraemer, S., Scott, J., Milanowski, A., Fairbain, S., & Bourn, R. (2015). *Human Capital Management Systems in the Teacher Incentive Fund (TIF) 4 Program*. U.S. Department of Education.

Scott, J., Milanowski, A., Miller, J., Finster, M., Doll, M., Roseland, D., Lewandowski, H., & White, B. (2014). *An evaluation of the Performance Evaluation Reform Act: Interim report*. Springfield, IL: Illinois State Board of Education.

Carlson, E., Scott, J., Zhang, X., Gutmann, B., & Sinclair, B. (2013). *Evaluation of the Regional Educational Laboratories: Interim report* (Publication No. NCEE 2013-4014). Washington, DC: U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance.

Presentations

Scott, J. & Pietryka, D. (2022). *Reimagining data-driven talent management systems: Data and communication collide to inform systemic change in the Arkansas Department of Education*. Poster to be presented at the Carnegie Summit Annual Meeting, San Diego, CA.

Murthy, C, Scott, J, & Lewis, L (2019). *Interventions for equity in college access and success* (panel presentation presenter). National College Attainment Network Conference, Pittsburgh, PA.

Kraemer, S., Scott, J., Fairbain, S., and Bourn, R. (2016). *The role of the Teacher Support Colleague in educator evaluation systems: A work design approach*. Paper presented at the American Educational Research Association Annual Meeting, Washington, D.C.

Kraemer, S., Scott, J., Fairbain, S., and Bourn, R. (2015). *Human Capital Management Systems in rural education*. Paper presented at the Rural Sociological Society Annual Meeting, Madison, WI.

Scott, J. (2015, March). *Best practices and lessons learned among TIF grantees*. Teacher Incentive Fund Regional Meeting, Phoenix, AZ.

Scott, J. (2015, March). *Sustaining TIF grants*. Teacher Incentive Fund Regional Meeting, Phoenix, AZ.

Scott, J. (2014). *Best practices and lessons learned among Florida TIF grantees*. Teacher Incentive Fund Regional Meeting, Tampa, FL.

Scott, J. (2014, September). *The use of student growth among TIF grantees*. Teacher Incentive Fund Regional Meeting, New York, NY.

Christian, M., Miller, J., & Scott, J. (2012, June). *Introduction to student growth metrics*. Teacher Incentive Fund Measurement Issues Conference, Ft. Lauderdale, FL.

Kraemer, S., Scott, J., & Spry, L. (2012). *Data quality innovation through knowledge management in the Teacher Incentive Fund program*. National Center for Education Statistics 25th Annual Management Information Systems Conference, San Diego, CA.

Scott, J., Miller, J., Brown, D., & Yoder, M. (2012, June). *Communicating and gaining buy-in for an education evaluation system*. Teacher Incentive Fund Measurement Issues Conference, Ft. Lauderdale, FL.

Diana Serrano, PhD

Research Scientist

Dr. Serrano is a Research Scientist in NORC's education and child development department. A bilingual and bicultural applied researcher based in Portland, Oregon, she brings advanced training in quantitative statistical methodology and qualitative methods to her work. Her expertise lies in research-practice partnerships, outcomes measurement, and data-driven decision-making. For 10 years, she has collaborated with university, local, and state-level partners to help build capacity and use data to drive evidence-based decision-making in the nonprofit sector. Drawing from her teaching experience—including positions teaching adult learners in the United States and students in K-12 in Germany and China, as well as working with children aged 6 months to 10 years in a dual language immersion program in the United States—she brings practical classroom insights to her research. Her work focuses on linguistically and culturally diverse populations, employing experimental and quasi-experimental designs to assess program effectiveness and inform policy decisions. Dr. Serrano currently serves as Principal Investigator on multiple projects, including an impact evaluation with Denver Public Schools that assesses the effectiveness of curriculum designed for English learners in improving literacy, math and socioemotional outcomes. She has also conducted mixed-method evaluations examining childcare access in Massachusetts and developed curricular math materials with language supports for sixth-grade English language learners.

Professional History

NORC at the University of Chicago

Research Scientist, 2002 - Present

Dr. Serrano leads a wide range of projects that focus on the use of inclusive and equitable research practices. She is currently the project director for the Farm and Food Workers Relief Grant, a 50-million-dollar grant funded by the United States Department of Agriculture. This project seeks to distribute \$600 payments to over 70,000 eligible farmworkers. On this project, Dr. Serrano led the design of the data system that allows to collect registration forms to assess eligibility and to distribute funds. While at NORC, Dr. Serrano also works on projects that focus on the educational experiences of young children in early childhood settings. She currently works on a project where Scholastic has partnered with NORC to conduct an experimental evaluation of a bilingual curriculum that seeks to improve students' academic and socio-emotional learning. Additionally, she also works on projects with the Department of Education in Delaware and Illinois to build data systems that leverage existing data sources to answer questions of interest for decision-making about resource allocation.

Educational Northwest

Senior Researcher, Quantitative Methods, 2002 - 2019

Dr. Serrano's portfolio comprised of multiple multi-year projects funded by the U.S. Department of Education's Office of English Language Acquisition (OELA), where she used both quantitative and qualitative research

Education

Ph.D., Social Policy

Brandeis University

M.A., International Policy Studies

Middlebury Institute of Internal Studies

B.A., German and Sociology

Willamette University

Expertise

Study Design Methodology

- Experimental research design
- Quasi-experimental research design
- What Works Clearinghouse certified reviewer (RCT and QED; v4.1)

Quantitative Analyses

- Longitudinal analyses
- Hierarchical linear modeling

Languages

- Spanish (native)

methods to answer questions on the impacts of professional development on teacher retention and on student outcomes across five states (Washington, Idaho, Oregon, California, and Texas). Additionally, she led, and supported proposal development related to teacher preparation programs, and educator pipeline. Lastly, she contributed to the distribution of research findings to a wide variety of audiences that include both technical and non-technical audiences, such as researchers, practitioners, and policymakers.

Education Development Center*Research Associate I, 2018 - 2019*

Dr. Serrano led recruitment efforts of students for cognitive interviews; contributed to the unit design; designed and implemented all interview protocols; conducted classroom observations; wrote up analyses and presented research findings to practitioners and researchers. The main aim of the Analyzing Diagrams: A Support for English Learners is to develop a fraction division unit targeting sixth grade English language learners. The unit seeks to address the inadequate access to mathematical learning opportunities for English learners. In this role, Dr. Serrano contributed to the recruitment of students for cognitive interviews; contribute to the unit design; design and implement all interview protocols; conduct classroom observations; write up analyses and present research findings to practitioners and researchers.

Waltham Public Schools*Lead Data Analyst, 2016 - 2019*

Dr. Serrano compiled, organized, and cleaned data from multiple sources to analyze English language learner, K-12, district wide research on students with limited or interrupted formal education. Additionally, she designed, administered, and analyzed teacher surveys on project-based learning professional development training.

Early Childhood Associates*Senior Research Associate, 2017*

Dr. Serrano oversaw data collection, quality, analysis, and report writing related to the multi-year Preschool Expansion Grant Evaluation in Maine. The grant targeted 13 school districts to expand high-quality early childhood education to four-year-old children whose families earn under 200 percent of the federal poverty line. The project's evaluation had two main objectives: assess the quality of expansion of the program implementation; and, to longitudinally examine students' academic achievement in the early grades, and whether classroom quality improved because of the grant. Dr. Serrano oversaw all data collection efforts, assessed data quality, and led data analyses and report writing. The focus of the data analysis was to longitudinally examine students' academic achievement in the early grades, and whether classroom quality improved because of the grant.

Currently Funded Research

National Migrant and Seasonal Head Start Association, \$2.5 million dollars – Distribute more than 88,000 COVID-19 relief payments to farmers affected by the pandemic.

Scholastic, \$1.2 million dollars – Use a randomize design to assess the impacts of access to PreK on My Way, a bilingual curriculum, on children's reading, math, and social emotional wellbeing outcomes.

New York City, \$275,000 – Evaluate the impacts of NeON Works, a program within the New York City Department of Probation that aims to reduce recidivism by providing individuals on probation with access to education, job training, counseling, and other supportive services tailored to their needs and circumstances.

Brandon Coffee-Borden

Senior Research Scientist

Brandon Coffee-Borden is a Senior Research Scientist at NORC with a passion for fostering environments where people can thrive and understanding how to build healthier communities. He brings 17 years of methodological expertise in evaluating the implementation and outcomes of systems change and place-based efforts. This work has spanned the areas of youth mentoring, youth violence prevention; health disparities and the social determinants of health, early childhood education, juvenile justice reform, education reform, prevention and treatment of adverse childhood experiences, community ownership and wealth-building, and workforce development. He has worked with nonprofits, foundations, and government agencies to build their capacity to translate data, research, and evaluation into actionable improvements in strategies focused on policy and systems change; community engagement, organizing, and advocacy; leadership development; community strengthening and resilience; and inter-organizational collaboration and network-building.

Professional Experience

Blueprint for Maryland's Future Interim Evaluation

Project Manager, 2025 - Present

NORC is working with the Accountability and Implementation Board to conduct an interim evaluation of the Blueprint for Maryland's Future. The evaluation is assessing the implementation progress of a multisector, multilevel initiative designed to improve college and career readiness among Maryland students.

Criminal Justice Evaluation and Learning Partner

Senior Research Scientist, 2021 - Present

The MacArthur Foundation's Criminal Justice Big Bet's Safety and Justice Challenge is working with a diverse network of 50 local jurisdictions, while amplifying local reform efforts through national research and communications strategies designed to change the way the country thinks about and uses jails. NORC is using culturally responsive racial equity evaluation approaches to: co-design and refine the initiative's theory of change and learning questions, implement developmental, formative, and summative evaluations to assess the initiative's implementation, outcomes, and impacts, synthesize findings across evaluations for multiple audiences, and conduct virtual and in-person facilitated learning sessions to inform ongoing development of the initiative's racial equity and community engagement strategies.

Education

M.P.P., Social Policy, Advanced Policy Analysis, and Program Evaluation

University of Minnesota

B.A., Political Science and Economics

University of Michigan

Expertise

Systems focused, complexity-aware, and placed-based evaluation

- Theory of change development
- Process and outcome evaluation design
- Mixed methods data collection
- Data and evaluation-related capacity building
- Critical reflection and learning processes

Equity-focused community and systems interventions

- Social determinants of health
- Health equity
- Interorganizational collaboration
- Community engagement, organizing, and advocacy
- Leadership development
- Youth leadership
- Network-building

Health Sciences Knowledge System Mapping Project

Senior Research Scientist, 2025 - Present

For the Robert Wood Johnson Foundation, NORC is facilitating a process to map the health sciences knowledge system to capture how knowledge is generated, disseminated, and used. This includes the creation of an overall actor map within the area, actor-focused theories of change and logic models, and recommendations for efforts to advance systems change and future evaluation activities.

Diverse Health Sciences Workforce Landscape Assessment

Project Director, 2022 - 2025

For Health Forward Foundation, NORC conducted a mixed methods assessment of the strengths, assets, gaps, and opportunities in the Kansas City region's health sciences workforce pipeline with a focus on facilitating access, retention, and advancement of groups historically underrepresented in the health sciences. The assessment team connected and connected regional stakeholders around the shared goal and value of a racially and ethnically diverse health sciences workforce pipeline; identifying local assets, barriers, gaps, and opportunities through document and literature review, analysis of secondary data, interviews, focus groups, and surveys; and developing recommendations for the Foundations future efforts.

FE Cities Systems Demonstration.

Co-project Director, 2024 - 2025

For the Centers for Financial Empowerment Fund (CFE Fund) NORC conducted a demonstration project designed to build the CFE Fund's capacity to use a systems change approach. The primary objective was to stage the types of questions, methods and analysis that could be employed in a future, full-scale storytelling-oriented evaluation of the Financial Empowerment Cities initiative through a small-scale demonstration evaluation project of the initiative. The second objective was to teach CFE Fund team members about the systems change approach to planning and evaluation, including systems mapping of the local context.

Evaluation of the Catalytic Communities Initiative

Senior Research Scientist, 2021 - 2023

For the Walton Family Foundation, NORC conducted a developmental evaluation of Catalytic Communities, an initiative to support diverse communities in creating community-demanded, community-driven and community-led systemic reforms in education ecosystems. The evaluation was designed to test the hypothesis that building the capacity, power, and influence of community coalition-based networks of parents, community members, and other local leaders who are meaningfully engaged in, demanding, and driving the community change process, will increase the effectiveness of systemic, place-based educational reform efforts and advance equity. To support the development of this initiative and assess its theory of change, NORC combined programmatic and systemic evaluation frameworks and qualitative and quantitative data collection and analysis approaches.

Professional History

NORC at the University of Chicago 2021 - Present

- *Senior Research Scientist*
2021 - present

Community Science, Gaithersburg, MD

- *Managing Associate*
2018 - 2021
- *Associate*
2014 - 2018

Mathematica Policy Research, Princeton, NJ

- *Research Analyst*
2009 - 2014

Wilder Research, Amherst H. Wilder Foundation, Saint Paul, MN

- *Wilder Fellow*
2008 - 2009

Change in Mind Texas Cohort Evaluation*Senior Research Scientist, 2021 - 2022*

For the Alliance for Strong Families and Communities, NORC conducted a three-year evaluation of the Change in Mind Learning Collaborative – Texas Cohort. Funded by the Episcopal Health and Powell Foundations, the Learning Collaborative will build the capacity of 10 community organizations to align research on early childhood brain development and use a racial equity lens to transform their organizations, their community service systems, and higher-level policy change. NORC presented and coached participants on developmental evaluation, rapid testing, and system change topics, and conducting implementation, outcome, and impact studies of the initiative.

Strong, Prosperous, and Resilient Communities Challenge Community Ownership Research.*Deputy Project Director, 2020 - 2021*

Provided research services to Strong, Prosperous, And Resilient Communities Challenge (SPARCC), an initiative of Enterprise Community Partners, the Low Income Investment Fund, and the Natural Resources Defense Council that invested in and amplified local efforts to reduce racial disparities, build a culture of health, and prepare for a changing climate through neighborhood and systems-level change. Oversaw research activities to identify promising collaborative approaches to support residential community ownership that increased operational efficiency while maintaining racial and social equity. Completed key informant interviews and a document review. Developed an analytic framework and drafted practitioner focused guides. Facilitated stakeholder learning sessions and presented via webinar.

Community Organizing Evaluation.*Deputy Project Director, 2018 - 2020*

Evaluated the Walton Family Foundation's strategy to support community engagement, community organizing, and advocacy to promote access to high-quality education for children and youth in select cities across the country. Completed a portfolio analysis that reviewed grantee reports and materials; developed an evaluation design; managed on-site and distance data collection activities with grantees, key informants, and resident leaders; and oversaw qualitative data analysis and reporting. Drafted rapid response memos to summarize existing data and review literature to identify measures for the implementation and outcomes of community organizing and effective practices for youth organizing. Supported a landscape assessment of the state of community organizing infrastructure within select communities in the United States.

My Brother's Keeper Community Challenge Competition Evaluation Design Project, Obama Foundation.*Co-Project Director, 2018 - 2019*

Developed a cross-community evaluation design for the Obama Foundation's My Brother's Keeper Community Challenge Competition, a multi-community strategy to improve youth mentoring and youth violence prevention programmatic capacity and pursue systems change to improve outcomes for boys and young men of color. Reviewed grantee applications and materials and foundation documents; interviewed grantees to assess their evaluation capacity and interests for the cross-site evaluation and created an evaluation design report. Provided technical assistance to grantees on development of community-specific theories of change and measurement frameworks.

Publications

- Hargreaves, M. B., Coffee-Borden, B., & Verbitsky-Savitz, N. (2020). Advancing the Measurement of Collective Community Capacity and the Evaluation of Community Capacity-Building Models. *New Directions for Evaluation*, 2020(165), 123-138.
- Hargreaves, M.B., Verbitsky-Savitz, N., Coffee-Borden, B., Perreras, L., White, C.R., Pecora, P.J., Morgan, G.B., Barila, T., Ervin, A., Case, L. and Hunter, R. (2017). Advancing the measurement of collective community capacity to address adverse childhood experiences and resilience. *Children and youth services review*, 76, 142-153.
- Hargreaves, M.B., Orfield, C., Honeycutt, T., Vine, M., Cabili, C., Coffee-Borden, B., Morzuch, M., Lebrun-Harris, L.A. and Fisher, S.K. (2017). Addressing childhood obesity through multisector collaborations: evaluation of a national

- quality improvement effort. *Journal of community health*, 42(4), 656-663.
- Dworsky, A., Dillman, K., Dion, M. R., Coffee-Borden, B., & Rosenau, M. (2015). "Housing for Youth Aging Out of Foster Care: A Review of the Literature and Program Typology" In P. Schultz (Ed.), *Youth Aging Out of Foster Care: Housing Needs and Opportunities*. Hauppauge, NY: Nova Science.
- Espinosa, O., Coffee-Borden, B., Bakos, A., & Nweke, O. (2016). Implementation of the National Partnership for Action to End Health Disparities: A Three-Year Retrospective. *Journal of health disparities research and practice*, 9(6), 3.
- Hargreaves, M., Cole, R., Coffee-Borden, B., Paulsell, D., & Boller, K. (2013). Evaluating infrastructure development in complex home visiting systems. *American journal of evaluation*, 34(2), 147-169. doi:10.1177/1098214012469271

bob maureen

Founder & CEO – Coaching Leaders Corp.

Founder & CEO of Coaching Leaders Corp. bob has many contracts with non-profit, for-profit, government and individuals to provide personal and executive coaching around Intercultural Responsiveness and Leadership Development. bob helps leaders leverage their experience, authenticity, and drive to elevate equity.

Professional Experience

David P. Weikart Center

Field Consultant, 2010 - Present

Field Consultant, responsible for training (throughout USA and Canada) statewide and local youth development networks in using Youth Program Quality Improvement and Assessment tools and initiatives.

School's Out Washington

Quality Coach, 2007 - 2017

Responsible for coaching local youth agencies through a Quality Improvement Process. Also coached 10 local agencies to develop their intercultural competence and provide equitable programs.

Camp Fire Northwest

Youth Development Coach, 2007 - 2013

Quality Improvement Specialist (using YPQA), 21st Century Community Learning Center Grant Director.

Spokane Regional Health District

Volunteer Program Coordinator, 2006 - 2007

Responsible for designing the infrastructure for over 500 volunteers.

WA State Dept. of Community Trade & Economic Development

Office of Manufactured Housing Installer Program Coordinator, 2004 – 2006

Responsible for designing and facilitating training and tracking procedures in accordance with WA state laws.

Utah Pride Center

Director of Youth Programs, 2002 – 2004

Responsible for all programs and services for LGBTQ youth and young adults 13-24, throughout the state of UT. Organized Utah's first Queer Prom for High School students.

Education

Certification, Professional Coach

Institute for Professional Excellence in Coaching

B.S., Gender Studies

University of Utah

B.A., Recreation Management and Youth Leadership

Brigham Young University

Community Involvement Experience

Spokane County United Way

• *IDID Qualified Administrator*
2014-current

Pride Prep Public Charter School Board

• *Board Chair*
2013 - 2015

Youth Development Network Spokane

2008 - 2016

KYRS Thin Air Community Radio

• *Queer Sounds Program Host*
2006 – 2019

Inland Northwest LGBT Center

• *Board Member*
2005 – 2006

Thurston County Dispute Resolution Center

• *Mediator*
2006

Stonewall Youth Center

• *Board Member*
2005 – 2006

Todd E. Johnson, Ph.D.

Director of Research and Data Analysis

Dr. Todd Johnson brings over two decades of applied expertise in program evaluation, educational systems research, and data-informed technical assistance in education, youth development, and behavioral health systems. He brings deep expertise in longitudinal evaluation design, quality improvement frameworks, and the delivery of technical assistance that is responsive to diverse site contexts. His portfolio includes managing multi-site evaluations for over 30 federally and state-funded programs, with long-term leadership experience as a local and statewide evaluator for the 21st Century Community Learning Centers (21st CCLC). Dr. Johnson has supported regional coaching infrastructure, developed site-level feedback systems, and authored performance dashboards that support continuous improvement. His work integrates stakeholder-informed planning, growth-based assessment models, and technical reporting that advances strategic learning. He has served as a university faculty member, a systems-level consultant, and an advisor to agencies and districts committed to advancing data-informed decision-making.

Professional Experience

Washington State CCLC Programs (Regional and Local)

Local Evaluator, 2007 - Present

Provided external evaluation for more than 10 regional and site-based 21st CCLC programs. Responsibilities include developing site-specific improvement plans, conducting SEL-PQA assessments, facilitating data use training, and producing implementation feedback reports. Support local program teams with guidance on performance tracking, planning cycles, and the use of data to guide service delivery. Coordinate closely with grantees to ensure alignment with federal and OSPI requirements.

Washington State CCLC Program (Statewide)

Statewide Evaluator, 2003 - 2007

Co-directed evaluation efforts for Washington's statewide 21st CCLC program. Led development of shared evaluation protocols, PPICS federal data reporting tools, and regional coordination processes. Supported OSPI in tracking program implementation, submitting federal performance reports, and providing technical assistance to grantees for systems-level improvement, responsiveness to diverse local program models.

Capital Region Educational Service District #113

Director, Center for Research and Data Analysis, 2007 - Present

Oversee the regional center providing research, evaluation, and data services to school districts and education programs. Manage evaluation contracts, produce analytic reports, design custom dashboards, and deliver strategic planning support. Projects span health, behavioral services, education innovation, and workforce readiness. Responsibilities include personnel supervision, stakeholder engagement, and training delivery.

Education

Ph.D., Educational Psychology (Research/Evaluation)

Auburn University

M.A., Rehabilitation Counseling (Vocational Evaluation)

University of Northern Colorado

B.S., Psychology, Minor in Sociology

Western Oregon University

Certifications

David P. Weikart Center for Youth Program Quality

- *Endorsed Assessor, Social Emotional Learning Program Quality Assessment, 2021 – Present*

Professional History

Capital Region Educational Service District #113, Tumwater, WA

- *Director, Research & Data Analysis*
2007 - present

Saint Martin's University, Lacey, WA

- *Adjunct Faculty, College of Education and Counseling Psychology*
2017 - present

Washington State University, Pullman, WA

- *Assistant Professor, Educational Psychology*
2002-2007

University of Memphis, Memphis, TN

- *Coordinator of Rehabilitation Training*
1995-1998

TN Division of Rehabilitation Services, Manchester, TN

- *Rehabilitation Training Center Manager*
1992-1995

Equity and Measurement in School Improvement (EMSI)

OSPI Regional Data Lead, 2007–2020

Supported statewide school improvement efforts with customized data reports, coaching, and continuous improvement tools. Led professional development workshops on using disaggregated data for planning..

Publications

Peer-Reviewed Journal Articles

Johnson, T. (2007). Canonical correlation of elementary Spanish-speaking English language learner's entry characteristics to current English language status. *Education*, 127(4), 400–409.

Brophy, M., & Johnson, T. (2007). Dual enrollment at the community college and high school: Where do students hear about it? *Journal of Applied Research in the Community College*, 15(1), 49–55.

Maring, G., Davis, D., Doty, J., Johnson, T., & Fickle, M. (2006). Video conferencing in a bridge-building/mathematics activity. *Journal of Online Mathematics and its Applications*, 6.

Johnson, T., & Brophy, M. (2006). Dual enrollment: Measuring factors for rural high school student participation. *The Rural Educator*, 28(1), 25–32.

Anctil, T. M., & Johnson, T. E. (2006). School Counselor Confidence Designing and Implementing a MEASURE: Experiences from Washington State. *Counselor Education Faculty Publications and Presentations*, 13.

Pitre, P., Johnson, T., & Cowan-Pitre, C. (2006). Understanding predisposition in college choice: Toward an integrated model of college choice and theory of reasoned action. *College and University Journal*, 81(2), 35–42.

Johnson, T., Maring, G., Doty, J., & Fickle, M. (2006). Cybermentoring: Evolving high-end video conferencing practices to support preservice teacher training. *Journal of Interactive Online Learning*, 5(1), 59–74.

Johnson, T. (2005). Trance and Treatment. *The International Journal of Clinical and Experimental Hypnosis*, 53(3), 334–338.

Johnson, T. (2005). Hypnosis in Clinical Practice: Steps for mastering hypnotherapy. *The International Journal of Clinical and Experimental Hypnosis*, 53(2), 229–231.

Simpson, R., Smith, S., & Johnson, T. (2003). Psychometric effects of altering the ceiling criterion on the Passage Comprehension Test of the Woodcock-Johnson Psychoeducational Battery-Revised. *Assessment for Effective Intervention*, 28(2), 35–40.

Shannon, D., Johnson, T., Searcy, S., & Lott, A. (2002). Using electronic surveys: Advice from survey professionals. *Practical Assessment, Research & Evaluation*, 8(1).

McDaniel, R., & Johnson, T. (2000). AssessNet: Internet service for functional assessment and accommodation matching. *Journal of*

Expertise

Program Evaluation and Quality Systems

- Quality Improvement Systems (QIS) Design and Execution
- Mixed-Methods and Longitudinal Evaluation Design
- Implementation Fidelity and Growth-Based Models
- SEL Frameworks Including SEL-PQA
- Site-Level Quality Improvement Plan (QIP) Development
- Evaluation Data Management and Reporting

Technical Assistance and Capacity Building

- Regional Coaching and Training Design
- Staff and Site Director Skill Development
- TA Tool and Protocol Development
- Responsive Support Based on Stakeholder Input
- Facilitation of Professional Learning Communities
- Local Implementation Support Across Diverse Sites

Strategic Data Use and Systems Integration

- Program Performance Dashboard Design and Use
- Disaggregated Data Analysis and Equity Indicators
- Stakeholder-Facing Data Interpretation
- Strategic Planning and Grant Evaluation
- Integration of Metrics Across Systems

Rehabilitation, 66(1), 43–44.

Johnson, T. (1996). Ethics committee compiles casebook. VEWA Newsletter, 23(3), 9.

Peer-Reviewed Conference Proceedings

Johnson, T. (2006, June). Measuring changes in motivation and learning strategies: Comparing freshman to other undergraduates. Proceedings of ASEE 2006: American Society for Engineering Education Annual Conference & Exposition.

Johnson, T., & Miller, R. (2006, June). Measuring engineering classroom community: Learning and connectedness of students. Proceedings of ASEE 2006: American Society for Engineering Education Annual Conference & Exposition.

Local Evaluation and Project Reports

Johnson, T. (2007–Present). External Evaluator, multiple 21st Century Community Learning Centers (21st CCLC) evaluations in Washington State. Evaluation reports prepared for OSPI and local school districts.

Johnson, T. (2016–2022). Evaluation lead for Youth Marijuana Prevention and Education Program (YMPEP). Cascade Pacific Action Alliance, Olympia, WA.

Johnson, T. (2020–2024). Evaluation of the Virginia State Tribal Education Partnership (STEP) Project. U.S. Department of Education.

Johnson, T. (2019–2022). Systems of Care evaluation. Washington Department of Social and Human Services, Tumwater, WA.

Johnson, T. (2013–2016). Evaluation of Thurston County Youth Recovery-Oriented System of Care. Thurston County Department of Health.

Johnson, T. (2008–2015). Local evaluation reports for JUMPSTART programs across Lewis County and Shelton School District, ESD 113.

Johnson, T. (2010–2013). External Evaluation of Department of Defense Middle School Math Program. Yelm School District.

Johnson, T. (2009–2012). Evaluation of Math, Science, Partnership program. Kiona-Benton School District.

Johnson, T. (2008–2009). Washington State Technical High School Feasibility Study. Office of the State Superintendent of Public Instruction.

Johnson, T. (2007–2008). Evaluation of the Mason County Building Bridges Project. ESD 113 and local partners.

Presentations

Johnson, T. (2007 - Present). Annual evaluation briefing for Washington 21st CCLC grantee cohorts: Program performance, SEL-PQA outcomes, and QIP fidelity. Presentations to regional grantees, Olympia, WA.

Johnson, T. (2020 to 2024). Evaluation findings for the Virginia Tribal Education STEP Project: Capacity building and systems integration. Presented to the U.S. Department of Education Tribal Partnership Meeting, virtual format.

Johnson, T. (2019). Local data use in continuous improvement systems: Dashboard strategies for school and community partners. Presented at ESD 113 regional convening, Tumwater, WA.

Johnson, T. (2020 - 2022). Thurston County Recovery-Oriented System of Care: Final evaluation summary and stakeholder engagement outcomes. Presented to Department of Public Health and project partners, Olympia, WA.

Johnson, T. (2009 - 2013). Evaluation of regional mathematics instruction in the Middle School Math Partnership: Student learning outcomes and teacher development. Presented to Kiona-Benton School District and ESD stakeholders, Kennewick, WA.

Johnson, T. (2009 - 2011). Feasibility study results for the proposed Washington State Technical High School. Presented to the Office of Superintendent of Public Instruction (OSPI), Olympia, WA.

Joyce Lynn Garrett

Curriculum Consultant

Retired education with 55 years of experience in curriculum and instruction, strategic planning, grant writing. Thirteen years working with school districts and private organizations across the US to develop 21st CCLC grant applications; collaborating on program evaluation; and providing technical assistance and professional development to program directors and CCLC staff. Thirty-five years of experience as a teacher and administrator in both basic and higher education developing innovative programs for classrooms, teacher education, interprofessional education, and technology.

Professional Experience

Government to Government (Tribal) Consultation

Developer

Developed the conceptual framework for five (5) training models for the Oregon Department of Education to train executive staff across Oregon's various state departments in the art and science of consultation with the nine sovereign tribal nations in Oregon. Completing the modules is dependent on the availability of funding.

Creating Defensible Spaces in the Sagebrush Steppe

Developer

Developed five (5) training modules for use by professional staff in conservation districts, fire districts, water districts, extension offices, and landowners with a vested interest in creating defensible spaces to protect property, structures, wildlife, and domestic animals in grassland areas of the sagebrush steppe. The project expanded to include STEM units for the K-12 schools and a three-day summer camp program where participants in grades 5 through 8 learn about the sagebrush steppe ecosystem and fire prevention strategies.

The River: A Study of the Columbia River

Developer

Created a K-12 curriculum for the Grand Coulee Dam School District 21st CCLC grant application (cohort 16). The curriculum included reading and math lessons, hands-on and experiential enrichment activities, SEL activities and parent engagement activities focused on the ASP and SSP theme: The River. The modules for this curriculum included a study of water and the water cycle (K); plants and animals (1/2); impact on community (3/4); geology and geography (5/6); history of the Grand Coulee Dam; (7/8); impact on tribal culture (9/10) and economics (11/12). The 21st CCLC application was funded by OSPI.

The Deschutes/Crooked River Watershed A K-8 Curriculum

Developer

This project was completed for a newly organized charter school in the Crook County School District located in Prineville, Oregon. The school's

Education

Ph.D., Curriculum and Instruction

University of Oregon

M.A./M.S. Special Ed/Curr & Instruction

University of Oregon

B.S./B.A Elementary Ed/Rec & Park Mgt

Oregon St University/University of Oregon

Professional History

Boise State University, Boise, ID

- *Dean & Professor; College of Education (Tenured)*
2000 - 2004

Indiana University of Pennsylvania, Indiana, PA

- *Associate Dean; College of Education & Technology*
1994 - 2000

Gallaudet University, Washington D.C.

- *Associate Professor, College of Education*
1990 - 1994

California State University, Chico, CA

- *Associate Professor (Tenured)*
1984 - 1990

Weber State University, Ogden, UT

- *Assistant Professor of Education*
1982 - 1984

University of Oregon, Eugene, OR

- *Graduate Teaching Assistant*
1976 - 1982

Creswell Public Schools, Creswell, OR

- *Director of Special Education Programs*
1978 - 1980

Eugene 4-J School District, Eugene, OR

- *Substitute Teacher*
1976 - 1978

Lincoln County School District, Newport, OR

- *Elementary PE; 5th & 6th Grades; Behavior Disorders Specialist; Coordinator of Outdoor Education Programs*
1970 - 1976

organizers and community members chose the watershed as the curricular theme from several options. For each grade level the curriculum was developed around a theme related to the watershed. Unit objectives were aligned with state and national standards across the curriculum. Authentic assessments were created to track students' progress and standardized year-end measures were used to ensure state standards were met. The curriculum was innovative for its time.

Publications

- Garrett, J. (2010) Hidden Messages in the Curriculum. *The Record*. 46, 2, 58-59. Kappa Delta Pi.
- Garrett, J. (2009) A Place for Education in the Stimulus Package. *The Record*. 45, 4, 156-157. Kappa Delta Pi.
- Garrett, J. (2009). Time for a Change: The Promise for Education. *The Record*. 45, 3, 104-105. Kappa Delta Pi.
- Garrett, J. (2009). Bring It" to Convo. *The Record*. 45, 2, 58-59. Kappa Delta Pi.
- Garrett, J. (2008). SOS: Written English is in Trouble. *The Record*. 45, 1, 8-9. Kappa Delta Pi
- Garrett, J. (2008). STEM: The 21st Century Sputnik. *The Record*. 44, 4, 152-153. Kappa Delta Pi.
- Garrett, J. (2008). Is Your School Accessible and Inviting? *The Record*. 44, 3, 106-107. Kappa Delta Pi.
- Garrett, J. (2008). Making Connections with Parents. *The Record*. 44, 2, 54-55. Kappa Delta Pi
- Garrett, J. (2007). A Teaching Repertoire. *The Record*. 44, 1, 6-7. Kappa Delta Pi.
- Garrett, J. (2007). Civics Education. *The Record*. 43, 4, 152-153. Kappa Delta Pi
- Garrett, J. (2007). Privatizing Education. *The Record*. 43, 3, 104-105. Kappa Delta Pi.
- Garrett, J. (2007). Homework. *The Record*. 43, 2, 56-57. Kappa Delta Pi.
- Garrett, J. (2006). Across the Threshold. *The Record*. 43, 1, 12-13. Kappa Delta Pi.
- Garrett, J. (2006). Educating the Whole Child. *The Record*. 42, 4, 154-155. Kappa Delta Pi
- Garrett, J. (2006). It's Time to Spring into Action Research. *The Record*. 42, 3, 104-105. Kappa Delta Pi.
- Garrett, J. (2006). Characteristics of an Honorable Teacher. *The Record*. 42, 2, 62-63. Kappa Delta Pi
- Garrett, J. (2005). Eye on the Target. *The Record*. 42, 1, 12-13. Kappa Delta Pi.
- Dupuis, M., Butzow, J. and Garrett, J. (1998). *Standards and Standard-Setting in Pennsylvania*.

Expertise

Curriculum Development

- Instructional design
- Broad content knowledge
- Creative thinker
- Knowledge of diverse learners
- Knowledge of state and national standards
- Ability to collaborate w/clients
- Andragogy and Pedagogy

Grant Writing

- Strong written skills
- Well-organized
- Detailed oriented
- Able to tackle a wide range of subject matter
- Able to meet deadlines

Program Evaluation

- Planning and implementation
- Data collection, collation, analysis, and utilization
- Evaluative thinker
- Cultural competency
- Report writing
- Strong communication skills

Strategic Planning

- Analytical thinking
- Collaboration
- Problem-solving
- Emotional intelligence
- Leadership skills

- Proceedings of the Pennsylvania Congress on Teacher Education. M. Dupuis and J. Hicks (eds). Pittsburgh, PA: Pennsylvania Association of Colleges and Teacher Educators.
- Garrett, J. and Dudt, K. (1998). Using videoconferencing to conduct pre-student teaching clinical observations. *Conference Proceedings of the Tenth Annual Meeting of The Society of Information Technology and Teacher Education*, on CD-Rom, Bethesda, Maryland.
- Dudt, K. and Garrett, J. (1997). Using videoconferencing to supervise student teachers: A preliminary report. *ED, Education at a Distance*, 11, 11, 20-23.
- Dudt, K. and Garrett, J. (1997). Using videoconferencing to improve the supervision of student teachers and pre-student teachers. *Proteus: A Journal of Idea in Technology and Education*, 14, 1, 22-24.
- Garrett, J. (1992). A reaction to Junious Williams: Reducing the disproportionately high frequency of disciplinary actions against minority students: An assessment-based policy approach. *Journal of Classroom Management*, 1, 5, 14-16.
- Braun, J. and Garrett, J. (1988). We are family. *Journal of Humanistic Education and Development*, 26, 4, 181-190.
- Garrett, J. (1983). Secondary education programming: What are the basics? *The Special Educator*, 3, 6, 2.
- Sylwester, R. and Garrett, J. (1981). A review of classroom management books for the classroom teacher. *Instructor Magazine*, 91, 2, 37.
- Sylwester, R. and Garrett, J. (1980). A review of classroom management programs for the classroom teacher. *Instructor Magazine*, 90, 3, 62-64.
- Arends, J., Garrett, J., and Arends, R. (1978). A cadre of specialists in organization development in the Polk County Florida Public Schools. Florida: Polk County School District.
- Arends, R., Hesse, K. Wheeler, S. and Garrett, J. (1978). Secondary teacher preparation program: Annual evaluation report. Eugene, Oregon: University of Oregon
- Sampson, J. and Garrett, J. (1976). Final report for the Lincoln County School District's intervention class for emotionally handicapped. *IMPACT Statement of Title VI Projects*. Salem, Oregon: Oregon State Department of Education.

Presentations

- Garrett, J. (2009) Using Grants to Fund Education Research and Projects. Kappa Delta Pi International Education Honor Society, Bi-Annual Convocation, Orlando, FL.
- Garrett, J. (2009). Publishing with Kappa Delta Pi: A Panel of Editors Kappa Delta Pi International Education Honor Society, Bi-Annual Convocation, Orlando, FL.
- "Technology and the NCATE Continuing Accreditation Process." Association of Teacher Educators Annual Meeting, Chicago, IL, February 13-17, 1999. (w/Drs. Allen Warner and Jerry Robinson, Art Wise, and Caroline Crawford)
- "A Technology Partnership: Lessons and Implications," Association of Teacher Educators, Summer Workshop, Minneapolis, MN, August 8-12, 1998. (w/Dr. Kenneth Borland)
- "Using Teleconferencing to Improve Pre-Student Teaching Clinical Experiences: First Year Data Report," Society for Information Technology and Teacher Education International Conference; Bethesda, MD, March 12-15, 1998. (w/Dr. Kurt Dudt)
- "A Cost Benefit Analysis of Using Videoconferencing to Supervise Student Teachers in Distant Locations," Society for Information Technology and Teacher Education International Conference; Bethesda, MD, March 12-15, 1998. (w/Dr. Kurt Dudt)
- "Using Teleconferencing to Conduct Student Teaching Supervision and Pre-Student Teaching Clinical Observations: A Report of Second Year Data," Association of Teacher Educators Annual Meeting; Dallas, TX, February 13-18, 1998.

- "Using Teleconferencing to Improve Pre-Student Teaching Clinical Experiences," Society for Information Technology and Teacher Education International Conference; Orlando, FL, April 1-5, 1997. (w/Dr. Kurt Dudd)
- "Using Teleconferencing to Improve Student Teaching Supervision," Society for Information Technology and Teacher Education International Conference; Orlando, FL, April 1-5, 1997. (w/Dr. Kurt Dudd)
- "Video Conferencing and Its Impact on a College of Education," International Conference on Challenges in Education; Aruba, July 10-12, 1996. (w/Dr. Kurt Dudd)
- "Using Video Conferencing to Improve the Supervision of Student Teachers and Pre-Student Teachers," What Works II Conference; State College, PA, June 21-23, 1996. (w/Dr. Kurt Dudd)
- "What Classroom Management Research, Writing, and Practice Tell Us About Restructuring Schools," Southeast Regional Association of Teacher Educators Annual Meeting; Nashville, TN, October 27-30, 1993.
- "Managing Diversity in the Classroom: Culture Based Explanations of Behavior," Kappa Delta Pi Conference; Towson State University, Towson, MD, October 2, 1993.
- "Managing Diversity in Restructuring Teacher Education: Human Relations Training as the Basis of Successful Change Efforts," Association of Teacher Educators Annual Meeting; Los Angeles, CA, February 13-17, 1993.
- "Recruiting and Keeping the Best," Address presented at the chartering ceremony for the Future Educators of America clubs for the DC Public Schools; Washington, DC, November 15, 1990.
- "Diagnostic Classroom Management," Association of Teacher Educators Annual Meeting; Las Vegas, NV, February 4-8, 1990.
- "Creating Classroom Environments for the Enhancement of Human Performance: Invitational Education Meets Performance Enhancement Psychology," Invited Address to the Transpersonal-Humanistic Special Interest Group, Association of Teacher Educators Annual Meeting; Las Vegas, NV, February 4-8, 1990.
- "Teacher Educators Look at Classrooms Through a Family Systems Model: Theory and Strategies," Association of Teacher Educators Annual Meeting; St. Louis MO, February 18-22, 1989. (w/Dr. Joseph Braun)
- "A Collaborative Consultation Model for Training Rural Special Educators," Annual Conference of the Teacher Education Division of the Council for Exceptional Children; Salt Lake City, UT, November 9-11, 1988.
- "Advance Preparation for Cooperating Teachers: Developing the Effective Use of the Clinical Supervision Model," Association of Teacher Educators Summer Workshop; Starkville, MI, August 7-10, 1988. (w/Dr. Bonnie Johnson)
- "Applying Family Systems Theory to Classrooms," Association of Teacher Educators Summer Workshop; Buffalo, NY, August 3-5, 1987. (w/Dr. Joseph Braun)
- "Future Directions of Special Education: Federal, State, and Local Perspectives," Keynote Address, Modoc Joint Unified Secondary Educators Workshop; Alturas, CA, November 17, 1986.
- "Using Instructional Television to Train Rural Special Educators," Fifth Annual Rural Special Educators Conference; Bellingham, WA, March 19-22, 1985.
- "The Effects of Participation in Rule Making on the Compliance Behavior of Elementary Students," Northern Rocky Mountain Education Research Association; Jackson Hole, WY, October 13-15, 1983.
- "Improving the Interpersonal Skills of Young Children," Families Alive Conference, Weber State University; Ogden, UT, September 14-16, 1983.
- "Improving the Interpersonal Skills of Young Children in Daycare and School Settings," the Eighth Annual Interinstitutional Early Childhood Conference; Salt Lake City, UT, June 8-9, 1982.
- "Teaching Young Children Responsible Behavior: Shaping UP the Management Practices of Adults," Keynote Address, Young Child Conference; Boise, ID, October 8-9, 1982.
- Garrett, J. (1998, 1999, 2000). Creating an Electronics Document Room for the NCATE Accreditation Process. NCATE National Conference. Washington, DC.
- Garrett, J. (1999). Technology and the NCATE Continuing Accreditation Process." Association of Teacher Educators Annual Meeting, Chicago, IL. (w/Drs. Allen Warner and Jerry Robinson, Art Wise, and Caroline Crawford)

- Garrett, J. A Technology Partnership: Lessons and Implications. Association of Teacher Educators, Summer Workshop, Minneapolis, MN, August 8-12, 1998. (w/Dr. Kenneth Borland)
- Garrett, J. (1998) Using Teleconferencing to Improve Pre-Student Teaching Clinical Experiences: First Year Data Report," Society for Information Technology and Teacher Education International Conference; Bethesda, MD, March 12-15, 1998. (w/Dr. Kurt Dudd)
- Garrett, J. (1998). A Cost Benefit Analysis of Using Videoconferencing to Supervise Student Teachers in Distant Locations, Society for Information Technology and Teacher Education International Conference; Bethesda, MD. (w/Dr. Kurt Dudd)
- Garrett, J. (1998). Using Teleconferencing to Conduct Student Teaching Supervision and Pre-Student Teaching Clinical Observations: A Report of Second Year Data," Association of Teacher Educators Annual Meeting; Dallas, TX.
- Garrett, J. (1997). Using Teleconferencing to Improve Pre-Student Teaching Clinical Experiences, Society for Information Technology and Teacher Education International Conference; Orlando, FL. (w/Dr. Kurt Dudd)
- Garrett, J. (1997). Using Teleconferencing to Improve Student Teaching Supervision," Society for Information Technology and Teacher Education International Conference; Orlando, FL. (w/Dr. Kurt Dudd)
- Garrett, J. (1996). Video Conferencing and Its Impact on a College of Education," International Conference on Challenges in Education; Aruba. (w/Dr. Kurt Dudd)
- Garrett, J. (1996). Using Video Conferencing to Improve the Supervision of Student Teachers and Pre-Student Teachers," What Works II Conference; State College, PA. (w/Dr. Kurt Dudd)
- Garrett, J. (1993). What Classroom Management Research, Writing, and Practice Tell Us About Restructuring Schools," Southeast Regional Association of Teacher Educators Annual Meeting; Nashville, TN/
- Garrett, J. (1993). Managing Diversity in the Classroom: Culture Based Explanations of Behavior," Kappa Delta Pi Conference; Towson State University, Towson, MD.
- Garrett, J. (1993). Managing Diversity in Restructuring Teacher Education: Human Relations Training as the Basis of Successful Change Efforts," Association of Teacher Educators Annual Meeting; Los Angeles, CA.

Bernie Sorenson

I'm a seasoned executive leader, systems coach, and strategic facilitator with over 30 years of experience leading collaborative, equity-centered transformation across schools, districts, state education agencies, and nonprofit systems. I bring a unique blend of practice-grounded leadership—having served as a high school and elementary principal, assistant superintendent, and SEA executive leader—and systems level coaching expertise through my work with the Region 16 Comprehensive Center. As a former director and site leader of 21st Century Community Learning Center (21st CCLC) programs, I know firsthand what it takes to build thriving, high-impact extended learning environments. My work centers on cultivating the conditions for trust, shared purpose, and collective capacity—helping teams and leaders co-create meaningful, sustainable change. I'm trained in process consultation, Professional Learning Communities (PLCs), Critical Friends Groups (CFGs), the Six Team Conditions framework, and the Collective Impact model. I bring a strengths-based, systems-thinking lens to every engagement, supporting individuals and organizations in building resilient learning cultures and achieving bold, purpose-driven results.

Professional Experience

Regional 16 Comprehensive Center

Center Director

Directed the Region 16 Comprehensive Center, leading capacity-building initiatives across Alaska, Washington, and Oregon in partnership with SEAs, school systems, Tribal leaders, and community-based organizations. Designed and implemented a shared stewardship model that brought together a network of networks—ESDs, SEAs, schools, and district leaders—to co-lead regional service delivery grounded in local priorities. Facilitated multi-state learning communities, strategic convenings, and leadership development efforts focused on educational equity, early literacy, Native education, systems coherence, and culturally sustaining practices. Guided the integration of technical assistance, coaching, and policy-informed implementation strategies to support sustainable, community-driven change.

State Department of Education – Alaska Department of Education & Early Development

Executive Team to the Commissioner: Organizational Development and Leadership Coach

Served as organizational development lead and executive team member to the Commissioner, supporting the statewide implementation of Alaska's Education Challenge and the AK Reads Act. Led internal alignment of leadership across divisions to ensure policy coherence, cross-functional collaboration, and readiness for high-impact implementation. Designed and facilitated strategic learning processes that connected internal SEA work with community and stakeholder engagement. Played a key role in shaping the statewide literacy strategy by developing a shared stewardship approach to align departmental leadership and external partners around equity-centered, measurable outcomes for Alaska's students.

Education

M.S., Education Leadership

University of Montana

B.S., Elementary Education

University of Montana

Certified Executive and Leadership Coach

Center for Executive Coaching

Certified Life and Career Coach

Shift – T Visual Coaching

Certified Systemic Team Coach

Academy of Executive Coaching

Professional History

Region 16 Comprehensive Center – AK, OR, WA

• *Center Director*

State Department of Education – Alaska department of Education & Early Development

• *Executive Team to the Commissioner: Organizational Development and Leadership Coach*

Education North West - Oregon

• *Manager, Consultant, and Technical Assistance Provider*

Juneau School District

- District-wide 21st Century Program Leader
- Principal – Juneau Douglas High School
- Assistant Superintendent of Instruction
- Principal – Glacial Valley Elementary
- Federal Programs Coordinator, Literacy Specialists, Director of Curriculum and Assessment

Education North West - Oregon*Manager, Consultant, and Technical Assistance Provider*

Led technical assistance and consulting initiatives across the Comprehensive Center, Regional Educational Laboratory (REL), and other federally funded programs. Designed and delivered capacity-building supports for SEAs, districts, and schools with a focus on culturally responsive practices, organizational learning, and adult development. Managed complex partnerships and provided strategic guidance to educational leaders on aligning research to practice, advancing equity goals, and building systems for continuous improvement. Facilitated co-design processes, multi-state learning networks, and sustained coaching engagements that helped clients translate insights into effective, scalable action.

Juneau School District*District-wide 21st Century Program Leader*

Led the design and implementation of the district's high-impact 21st Century Community Learning Centers (21st CCLC) programming, including the launch of CARES (Credit Achievement, Recovery, and Employability Skills)—an innovative extended learning initiative for high school students at risk of not graduating. Built and coached a cross-functional team of educators, community partners, and youth advocates to co-create a program centered on academic support, youth empowerment, and meaningful relationship-building. Developed structures that increased student engagement, improved attendance, and accelerated pathways to graduation for historically underserved students. The program's success was recognized statewide for its equity-centered design and strong outcomes, and became a model for re-engaging youth through culturally responsive, community-rooted learning.

Juneau School District*Principal - Juneau Douglas High School*

Led one of Alaska's largest and most complex high schools, overseeing all aspects of academic programming, operations, and community engagement for a student body of 1,800+ in a facility built for 1,000. Navigated a politically charged and highly visible transition from one to two high schools, co-leading the district's planning and community engagement process for creating innovative, smaller learning communities. Authored successful federal and state grant proposals to fund the redesign and guided a staff of over 110 through structural and instructional change. Championed initiatives to increase personalization, relevance, and academic rigor—launching a Freshman First transition model, advisory programs, and targeted supports to improve graduation rates and student success. Balanced strategic innovation with the daily demands of school leadership, including discipline, budget management, staff development, and cultivating strong relationships with students, families, and the broader community.

Juneau School District*Assistant Superintendent of Instruction*

Provided district-wide leadership for curriculum, instruction, and professional learning across all grade levels, while serving as a close advisor and strategic partner to the Superintendent. Led the development and implementation of instructional priorities, equity-focused academic initiatives, and assessment systems designed to improve outcomes for all students. Designed and launched a district-wide coaching program to support school leaders in instructional leadership, change management, and team development. Played a central role in high-stakes budget planning and labor negotiations, helping align resources with the district's strategic goals. Cultivated strong, trust-based relationships with educators, families, and community stakeholders to build shared ownership of the district's instructional vision.

Brent E. Cummings

I am an innovative, creative, and dynamic community leader committed to fostering student well-being through a collaborative process focused on a common vision and a passion for expanding our field's high quality educational resources.

Professional Experience

Walla Walla Public Schools

Director and Community Experience Outreach and Partnerships

Coordinator for the Center for Children and Families, 2022 - Present

Leading the Walla Walla Center for Children & Families preschool birth-to-five services for children and parents as a coordinated and comprehensive community learning hub. Within this role, implementing and directing district-wide initiatives to address and help overcome the staggering access gap for many Walla Walla children and families, promoting an inclusive community resource that encourages integration, engagement and opportunity for all. In addition, responsibilities include fostering and maintaining a network of partner organizations that provide co-located services and warm handoff/ referrals that allow the community to leverage resources, meet needs, and avoid duplicative efforts.

Director of Accelerated Learning & Support, 2021-222

Lead various aspects of the district's Academic and Student Well-Being Recovery Plan, the responsibilities of this role included: the creation, planning, implementation, and management of the 3-year Summer Sol program; the re-establishment, growth, and stewardship of WWPS' community partnerships (including Communities in Schools), the administrative oversight of the 21st CCLC programs, and strategic grant writing for specific recovery plan and district growth initiatives (ESSER III - Afterschool Supplementary Fundings and Digital Equity and Inclusion Grants).

21st CCLC Program Director, 2013-2021

Responsible for the creation and management of the WWPS' 21st Century Community Learning Centers (CCLC) that provide academic enrichment opportunities during non-school hours for children, particularly students who attend high-poverty and low-performing schools; directly oversees the hiring and supervision of multiple levels of staff and employees at eight different sites. Totaling \$9.1 million, these programs helped students at nine different schools meet state and local student standards in core academic subjects, such as reading and math; offer students a broad array of enrichment activities that can complement their regular academic programs; offer literacy and other educational services to the families of participating children.

Education

Certification, Program Administration

Washinton State University, Tri-Cities

M.A., Educational Leadership

Washinton State University, Tri-Cities

B.A., History

University of Montana

Professional History

Walla Wall Public Schools

- *Director and Community Experience Outreach and Partnerships Coordinator for the Center for Children and Families*
2022 – present
- *Director of Accelerated Learning & Support*
2021 - 2022
- *21st CCLC Program Director*
2013 - 2021

Afterschool Alliance

- *Afterschool Ambassador*
2014 - 2015

Northwest Learning and Achievement Group

- *21st CCLC Site Coordinator*
2005 - 2013

Northwest Learning and Achievement Group*21st CCLC Site Coordinator, 2005 - 2013*

Responsible for the development, social-marketing, administration, and management of the 21st Century Community Learning Center grants at Garrison Middle School in Walla Walla, WA; oversaw the hiring and supervision of multiple levels of staff and employees. These afterschool programs were innovative, efficiently managed, cost effective, and result-oriented, with primary emphasis on assisting youth to achieve academic and personal goals. Student populations were targeted, and performance was evaluated at the local, state, and federal levels.

Credentials

HUMAN RESEARCH - SOCIAL & BEHAVIORAL RESEARCHERS BASIC COURSE, UNDER REQUIREMENTS SET BY WASHINGTON STATE GOVERNMENT AGENCIES, 2018-2027 DSHS IRB Youth Resilience Study - original WWPS research study focusing on afterschool programs, student resilience skills and contexts, and academic/SEL measurable outcomes.

WASHINGTON STATE EMERGENCY SUBSTITUTE CERTIFICATION, 2022-2026

Upon request by Walla Walla Public Schools, completed by educator.

STANDARDS OF QUALITY FOR FAMILY STRENGTHENING & SUPPORT, NATIONAL FAMILY SUPPORT NETWORK, 2023-2025

The nationally-adopted Standards of Quality for Family Strengthening & Support are designed to be used by all stakeholders – public departments, foundations, networks, community-based organizations, and families - as a tool for planning, providing, and assessing quality practice. The Standards have created a common language across different kinds of Family Strengthening and Family Support programs such as Family Resource Centers, home visiting programs, and child development programs.

PBLWORKS 101 - GOLD STANDARD PROJECT BASED LEARNING & PBLWORKS 201 - EQUITY & GOLD STANDARD PBL, 2019 & 2022 Certified in the skills to design, assess, and manage rigorous, standards-based projects.

Understands how to revise existing project plans and create supporting lessons that demonstrate the application of the four equity levers (Knowledge of Students, Cognitive Demand, Literacy, and Shared Power) to meet the needs of students.

MANAGEMENT, TRAINER OF TRAINERS, DAVID P. WEIKERT CENTER FOR YOUTH PROGRAM QUALITY, 2018

Certified trainer for Quality Coaching and Planning with Data management modules.

YOUTH WORKS METHODS, TRAINER OF TRAINERS, DAVID P. WEIKERT CENTER FOR YOUTH PROGRAM

QUALITY, 2018 Certified trainer for youth works methods best-practice modules: Active Learning, Ask Listen-Encourage, Structure & Clear Limits, Youth Voice, Planning & Reflection, Homework Help, Cooperative Learning, Building Community, Reframing Conflict, and the Active Participatory Approach.

Presentations

Cummings, B. (2019) MTSS FEST EAST, SCHOOL MENTAL HEALTH ASSESSMENT, RESEARCH, & TRAINING (SMART) CENTER - UNIVERSITY OF WASHINGTON, SPOKANE, WA.

Session Workshop: Building Community: An Afterschool Program Integrated Student Supports Model

Cummings, B. (2018) FREE AND CHARITABLE CARE CONFERENCE, WASHINGTON HEALTHCARE ACCESS ALLIANCE, SPOKANE, WA.

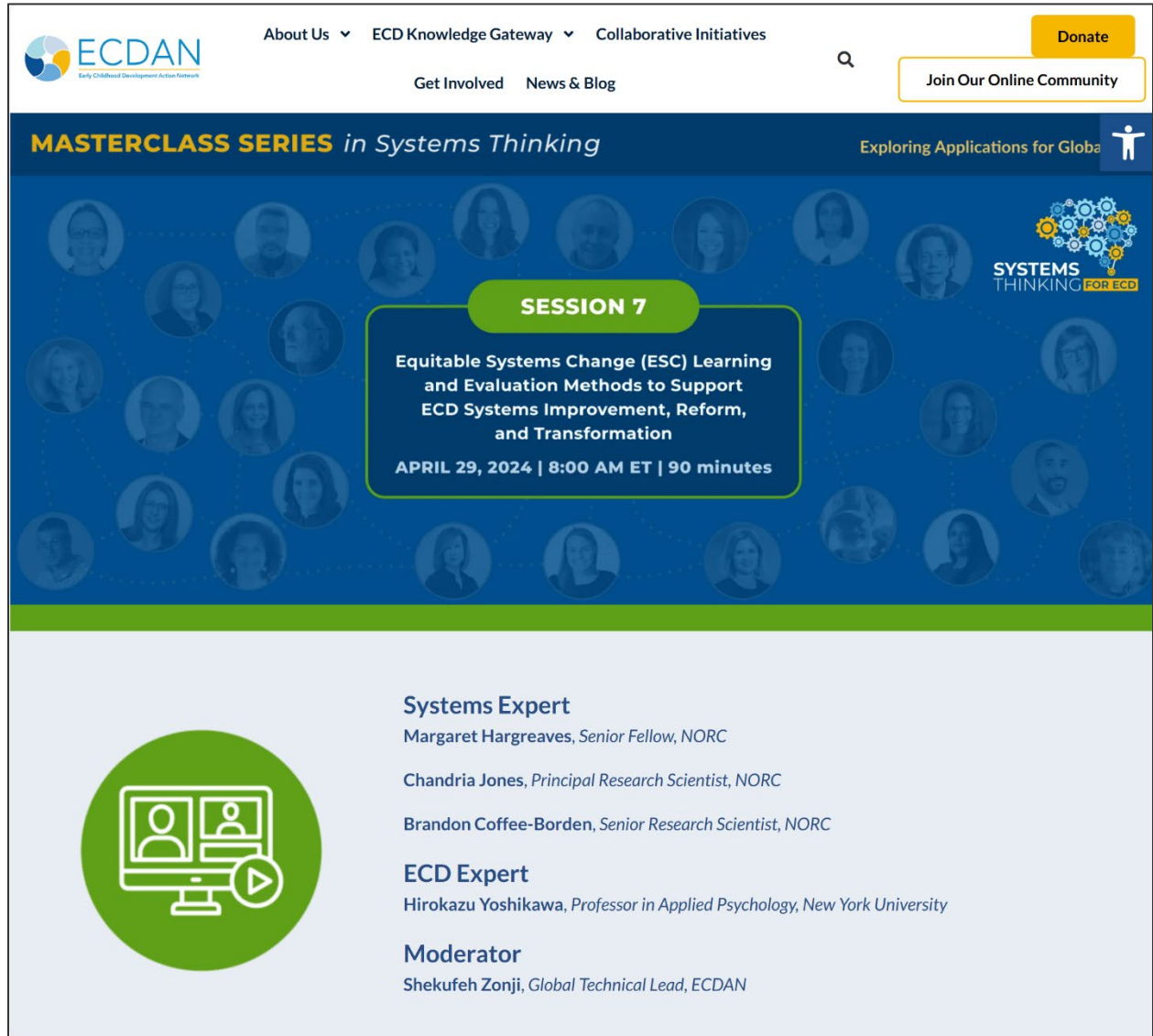
Session Workshop: Money, Money, Money: Grant-writing 101

Cummings, B. (2016 & 2018) DO CONFERENCE (WWPS 21ST CCLC), WALLA WALLA, WA.

Plenary: "Doers, Doing! - The Life Lessons of 'Hands-On' Learning" & "Lecture is Boring: Activism in Education"

Appendix B: Examples/Samples of Related Projects/Previous Work

Sample 1a. Early Childhood Development Action Network (ECDAN)



The screenshot displays the ECDAN website's header with navigation links: About Us, ECD Knowledge Gateway, Collaborative Initiatives, Get Involved, and News & Blog. A search icon and a 'Join Our Online Community' button are also present. The main banner features the text 'MASTERCLASS SERIES in Systems Thinking' and 'Exploring Applications for Global'. A central green box highlights 'SESSION 7: Equitable Systems Change (ESC) Learning and Evaluation Methods to Support ECD Systems Improvement, Reform, and Transformation' scheduled for April 29, 2024, at 8:00 AM ET for 90 minutes. The background of the banner is a grid of circular portraits. Below the banner, a green circular icon with a video player symbol is shown. To its right, the speakers are listed: Systems Expert Margaret Hargreaves (Senior Fellow, NORC), Chandria Jones (Principal Research Scientist, NORC), and Brandon Coffee-Borden (Senior Research Scientist, NORC); ECD Expert Hirokazu Yoshikawa (Professor in Applied Psychology, New York University); and Moderator Shekufeh Zonji (Global Technical Lead, ECDAN).

SESSION 7
Equitable Systems Change (ESC) Learning and Evaluation Methods to Support ECD Systems Improvement, Reform, and Transformation
APRIL 29, 2024 | 8:00 AM ET | 90 minutes

Systems Expert
Margaret Hargreaves, *Senior Fellow, NORC*
Chandria Jones, *Principal Research Scientist, NORC*
Brandon Coffee-Borden, *Senior Research Scientist, NORC*

ECD Expert
Hirokazu Yoshikawa, *Professor in Applied Psychology, New York University*

Moderator
Shekufeh Zonji, *Global Technical Lead, ECDAN*

Sample 1b. Early Childhood Development Action Network (ECDAN)



The screenshot shows the ECDAN website banner for the Masterclass Series in Systems Thinking. The banner features a blue background with a network of circular portraits of participants connected by dotted lines. The text on the banner includes:

- ECDAN** Early Childhood Development Action Network
- Navigation links: About Us, ECD Knowledge Gateway, Collaborative Initiatives, Get Involved, News & Blog
- Buttons: Donate, Join Our Online Community
- Event dates: April 23 – May 2, 2024
- MASTERCLASS SERIES** in Systems Thinking
- Exploring Applications for Global ECD
- Logos for ECDAN, Harvard T.H. Chan School of Public Health, and Systems Thinking for ECD
- Text: The Systems Thinking for Early Childhood Development (ECD) Initiative is a partnership between ECDAN and Harvard T.H. Chan School of Public Health and supported by Porticus.

Below the banner, the text reads:

ECDAN's inaugural Masterclass Series in Systems Thinking for Early Childhood Development (ECD) brought together a global community for 14 free, interactive online sessions from April 23 to May 2, 2024. Over 20 leading experts in systems thinking and ECD shared invaluable insights. The series was curated by NORC's Senior Fellow, Margaret Hargreaves and ECDAN's Global Technical Lead, Shekufeh Zonji, with the support of Harvard T.H. Chan School of Public Health.

There were 12,479 total registrations and 1,210 unique live attendees, and 318 participants received certificates for attending seven or more sessions.

SYSTEMS THINKING FOR ECD

Sample 2. AmeriCorps

Logic Model Slides

NORC at the University of Chicago

How to Develop a Logic Model

Learning Objectives



By the end of this presentation, you will be able to:

- Describe what a logic model is, and how it can be useful to your daily program operations
- Identify the key components of a logic model
- Develop a logic model for your program
- Use a logic model for evaluation planning

Overview of the Presentation

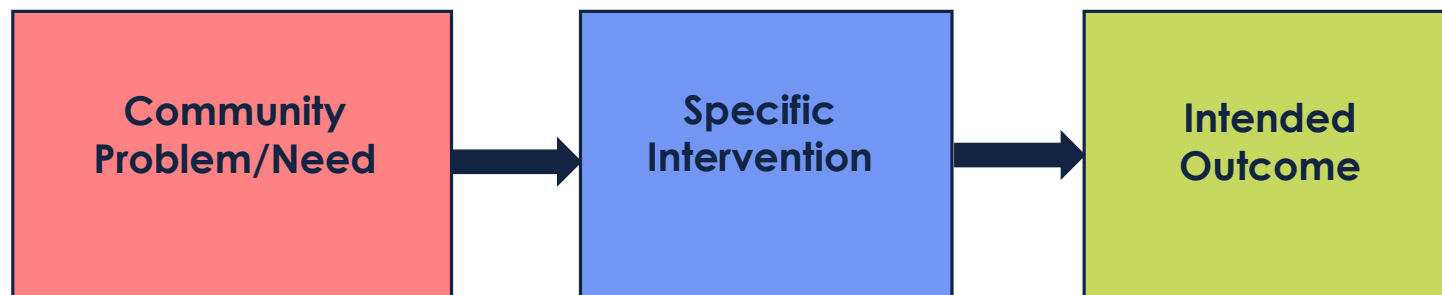


- A program's theory of change and logic model
- Uses of logic models
- Components of a logic model
- How to read a logic model
- How to develop a logic model
- How to apply logic models to evaluation

Theory of Change



- The general underlying idea of how you believe your intervention will create change
- There are three main elements:

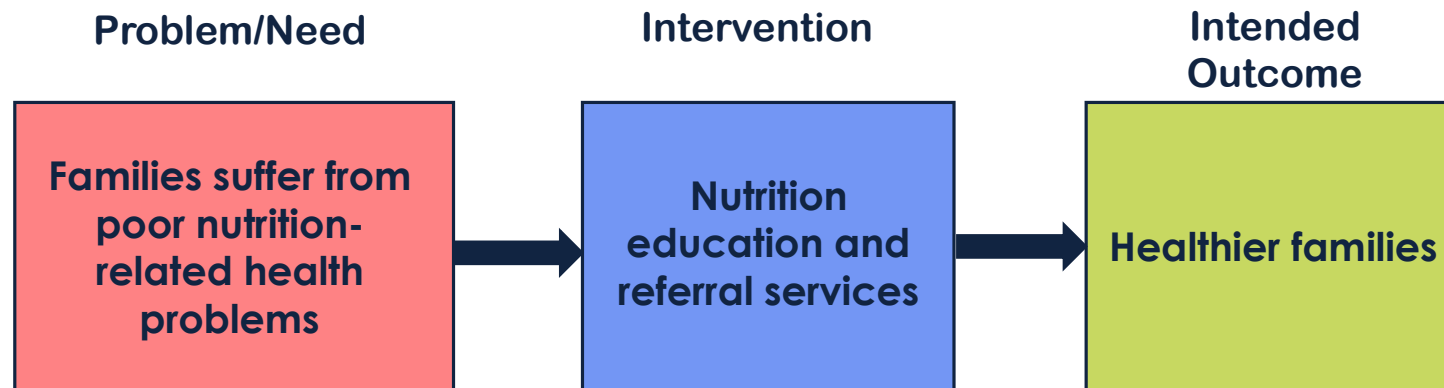


- For an overview of theory of change and evidence, ASN grantees can refer to the modules, "[Designing Effective Action for Change](#)".

Example of a Program's Theory of Change



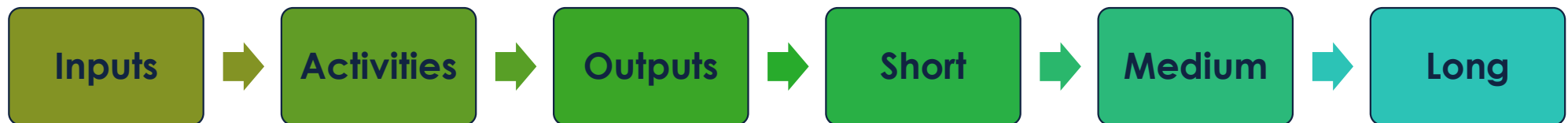
- Theory of change for a nutrition assistance program:



What is a Logic Model?



- A detailed visual representation of a program and its theory of change.
- Communicates how a program works by depicting the intended relationships among program components:
 - Inputs or resources
 - Activities
 - Outputs
 - Outcomes



Why Develop a Logic Model?

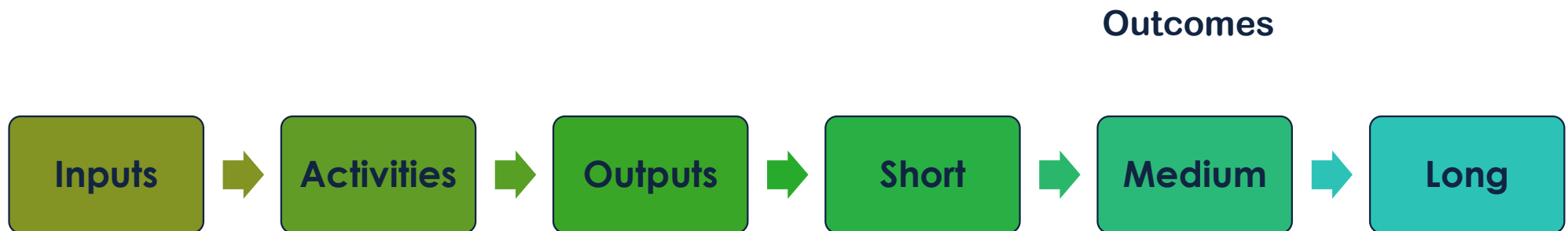


- Generate a clear and shared understanding of how a program works
- Support program planning and improvement
- **Serve as foundation for evaluation**

Key Components of a Logic Model



- Inputs or resources
- Activities
- Outputs
- Outcomes (short-, medium- and long-term)



Key Components of a Logic Model



- **Inputs or resources** include the human, financial, organizational, and community resources available for carrying out a program's activities.
- Examples:
 - Funding
 - Program staff
 - AmeriCorps Seniors
 - Volunteers
 - Training
 - Research

Key Components of a Logic Model



- **Activities** are the processes, tools, events, and actions that are used to bring about a program's intended changes or results.
- Examples:
 - Workshops on healthy food options
 - Food preparation counseling
 - Referrals to food programs and resources

Key Components of a Logic Model



- **Outputs** are the direct products of a program's activities and may include types, levels and targets of services to be delivered by the program.
- Examples:
 - # individuals attending workshops
 - # individuals receiving services
 - # individuals receiving referrals

Key Components of a Logic Model



- **Outcomes** are the expected changes in the population served that result from a program's activities and fall along a continuum, ranging from short to long term results:
 - Short-term: changes in knowledge, skills, and/or attitudes (e.g., ↑ knowledge healthy choices)
 - Medium-term: changes in behavior or action (e.g., ↑ adoption of healthy food practices)
 - Long-term: changes in condition or status in life (e.g., ↑ food security)

Difference Between Outputs and Outcomes

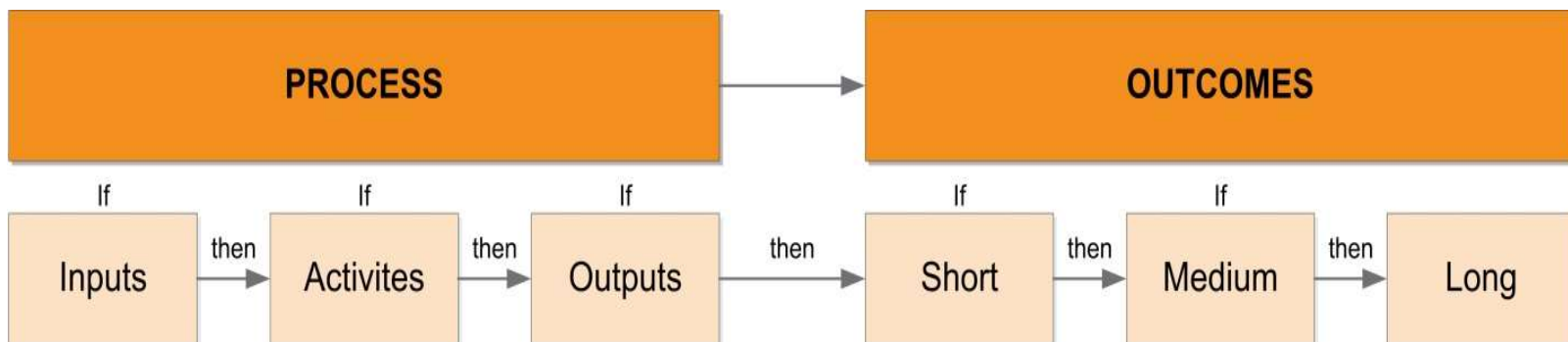


Outputs	Outcomes
• Direct products of a program's activities/services • Often expressed numerically or quantified in some way • Examples: # attending workshops # receiving services # receiving referrals	• Changes resulting from a program's activities/services • Often expressed in terms of change in knowledge, attitude, behavior, or condition • Examples: ↑ knowledge healthy choices ↑ adoption healthy practices ↑ food security

Two Major Sides to a Logic Model



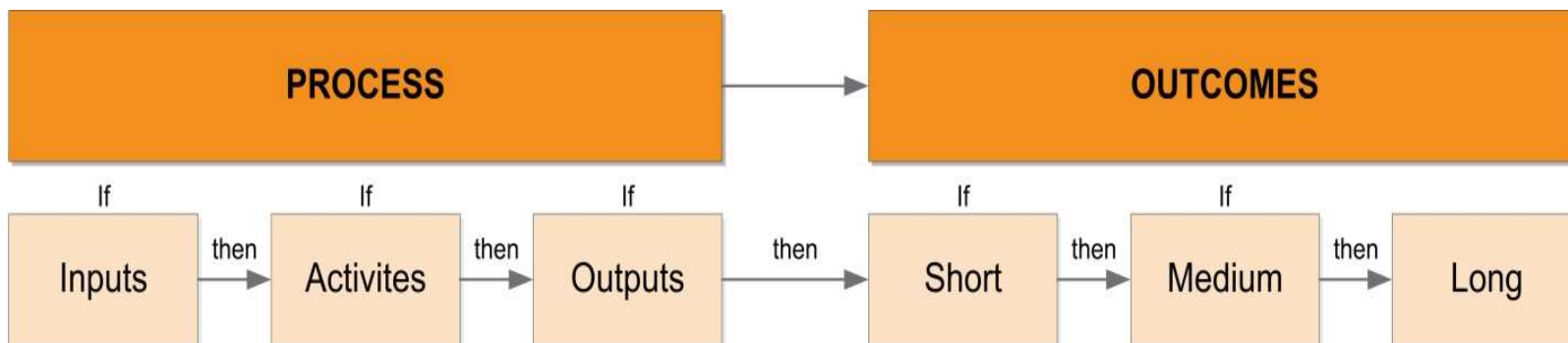
- Read from left to right
- Two “sides” to a logic model - a process side and an outcomes side



How to Develop a Logic Model



- Two main approaches are used to create a logic model:
 - Reverse logic (right to left) – asks “but how” questions
 - Forward logic (left to right) – uses “if...then” statements



How to Create a Logic Model Using Reverse Logic – Sample Nutrition Program

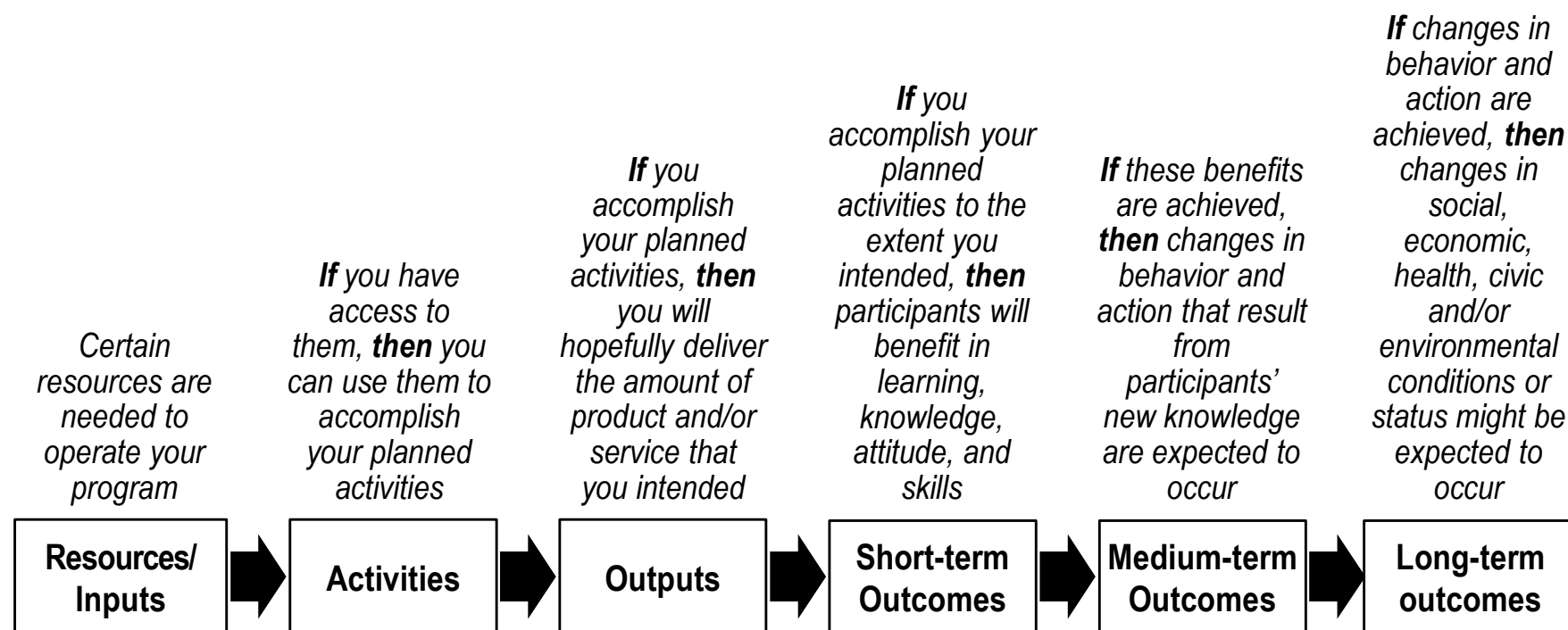


- What is the desired long-term outcome?
 - Increase # of healthy families. ***But how?***
- What is the desired intermediate outcome?
 - Increase # of families using healthy food practices. ***But how?***
- What is the desired short-term outcome?
 - Individuals gain knowledge of healthy food choices. ***But how?***
- What outputs are needed to achieve the outcomes?
 - 200 families complete an educational workshop. ***But how?***
- What activities are needed to achieve the outcomes?
 - Conduct four educational workshops per month. ***But how?***
- What inputs are needed to achieve the outcomes?
 - Funding, program staff, AmeriCorps Seniors, volunteers, research.



How to Create a Logic Model Using Forward Logic – Sample Nutrition Program

- Forward logic uses “if-then” statements.



Source: W.K. Kellogg Foundation Evaluation Handbook (2004), Adapted

Questions to Consider as You Create a Logic Model



Component		Questions to consider
	Inputs/ Resources	What resources do you need to implement your program?
	Activities	What activities will be or are being carried out to achieve your program's desired outcomes?
	Outputs	What are the direct products of your program's activities?
Outcomes	Short-term	What changes in knowledge, skills, and/or attitudes do you expect from your program?
	Medium-term	What changes in behavior or actions do you expect from your program?
	Long-term	What changes in status or condition do you expect from your program?

Exercise: Develop a Logic Model for a Wildlife Conservation Program



Exercise #1

- **Theory of Change.** A wildlife conservation program is designed to create healthy, productive, and sustainable ecosystems for the benefit of wildlife in areas of need.
- **What might this program's logic model look like?**

Example Logic Model for a Wildlife Conservation Program



PROBLEM	INPUTS	ACTIVITIES	OUTPUTS	Outcomes		
				Short-Term	Medium-Term	Long-Term
Community problem or need	What we invest	What we do	Direct products from program activities	Changes in knowledge, skills, attitudes, opinions	Changes in behavior or action that result from participants' new knowledge	Meaningful changes, often in their condition or status in life
The presence of invasive species and waste (e.g., trash from hikers or visitors) has made it difficult for wildlife to prosper, thus resulting in the reduction of native species (plant and wildlife) and negatively affecting the area's ecosystem	Funding	Conduct waste removal projects	Plant native plant species on 30 sites	Increase in food and clean water supply for native wildlife	Increase in native wildlife population sizes	Conservation of healthy, productive, sustainable ecosystems for the benefit of wildlife
	Staff	Conduct habitat development projects	Remove invasive plant species on 30 sites	Increase in available shelter for native wildlife	Increase in biodiversity	
	200 AmeriCorps State and National members	Conduct invasive species removal	Remove toxic waste on 50 acres of wetlands	Increase in habitat connectivity		
	200 non-AmeriCorps volunteers	Develop habitat corridors	Develop habitat corridors on 10 sites	Improve habitat space for native wildlife		
	Research					

Developing a Logic Model



Exercise #2

- In each column of the logic model template, identify the following key components for your program:
 - Inputs
 - Activities
 - Outputs
 - Outcomes (short-, medium- and long-term)

Verify Your Logic Model



- Consider asking the following questions:
 - **Level of detail:** Does your model contain an appropriate amount of detail for its intended use? Does it include all key program components?
 - **Plausible:** Does the logic of the model seem correct? Are there any gaps in the logic of the program?
 - **Realistic:** Is it reasonable to assume that the program can achieve the expected outcomes?
 - **Consensus:** Do program staff and external stakeholders agree that the model accurately depicts the program and its intended results?

Performance Measurement and Program Evaluation



Performance Measurement	Program Evaluation
• Ongoing monitoring and reporting of program accomplishments and progress • Explains what level of performance is achieved by the program	• In-depth research activity conducted periodically or on an ad-hoc basis • Answers questions or tests hypotheses about program processes and/or outcomes • Used to assess whether or not a program works as expected and why (e.g., did the program cause the observed changes?)

Logic Models as a Performance Measurement Tool



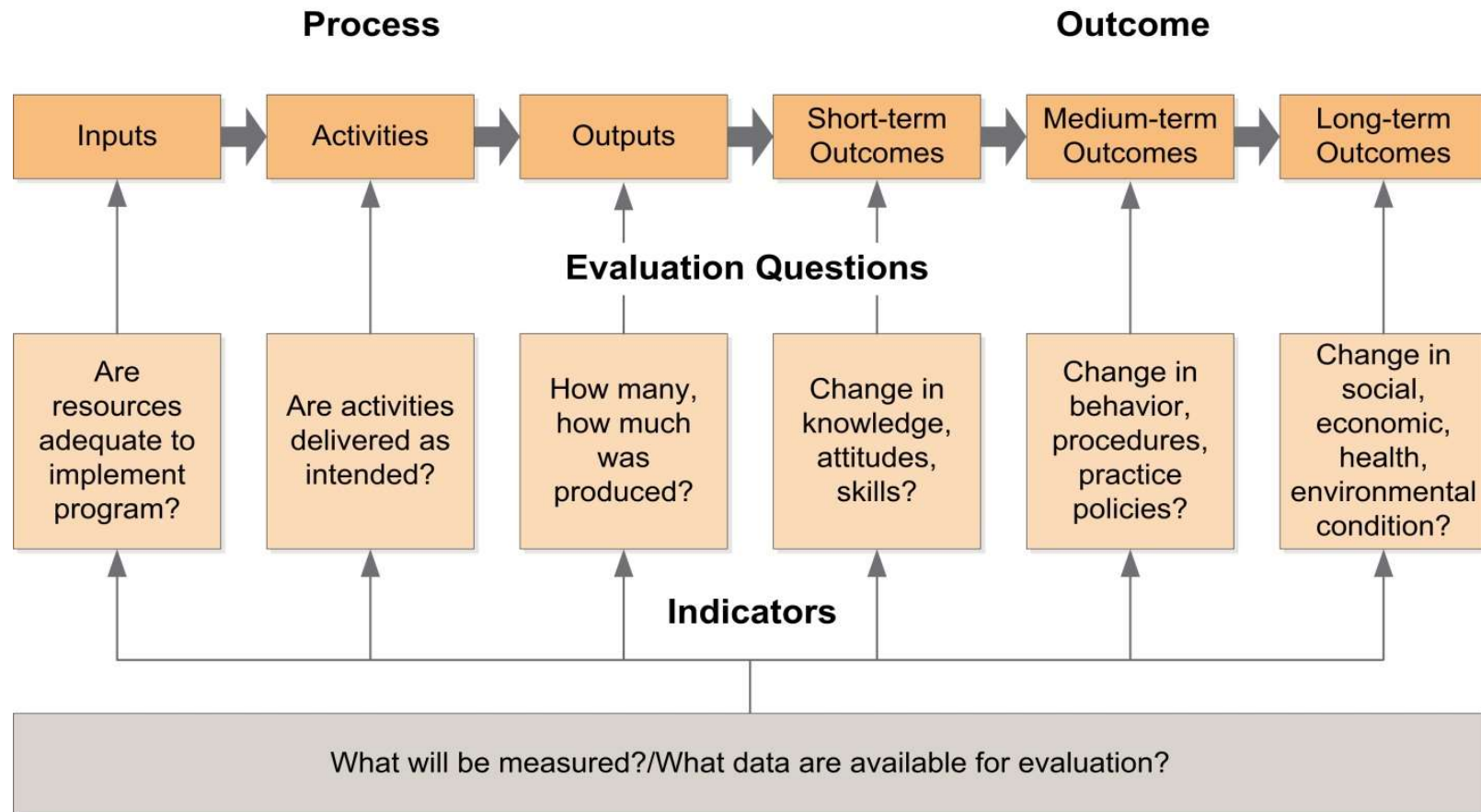
- A logic model can serve as a framework for planning performance measurement activities. It can help to:
 - Identify components of your program to include in performance measurement
 - Identify indicators and the measures of progress/performance that align with program components

Logic Models as an Evaluation Tool



- A logic model can serve as a framework for your evaluation plan. It can help you focus your evaluation by identifying:
 - Questions want/need answered
 - Aspects of program to evaluate
 - Type of evaluation design
 - Information to collect
 - Measures and data collection methods
 - Evaluation timeframe

Determining What to Evaluate



Determining What to Evaluate – Sample Nutrition Program



Process

Outcomes

PROBLEM	INPUTS	ACTIVITIES	OUTPUTS	Outcomes		
				Short-Term	Medium-Term	Long-Term
Families suffer from poor nutrition-related health problems and there is limited services available to better educate families and individuals on the importance of integrating healthy foods into their diets.	Funding Staff 200 AmeriCorps State and National members Research	Conduct educational workshops Provide nutrition and food prep counseling Provide referrals to food programs and resources	# individuals receiving education # individuals receiving services # individuals receiving referrals	Increased knowledge of healthy food choices Improved attitudes about healthy eating Improved skill in preparation of healthy foods Increased knowledge of food programs and community food resources	Increased adoption of healthy food practices Increased access to more food options	Families are healthier Increased household food security

Determining What to Evaluate – Sample Nutrition Program



Process

Outcomes

PROBLEM	INPUTS	ACTIVITIES	OUTPUTS	Outcomes		
				Short-Term	Medium-Term	Long-Term
Families suffer from poor nutrition-related health problems and there is limited services available to better educate families and individuals on the importance of integrating healthy foods into their diets.	Funding Staff 200 AmeriCorps State and National members Research	Conduct educational workshops Provide nutrition and food prep counseling Provide referrals to food programs and resources	# individuals receiving education # individuals receiving services # individuals receiving referrals	Increased knowledge of healthy food choices Improved attitudes about healthy eating Improved skill in preparation of healthy foods Increased knowledge of food programs and community food resources	Increased adoption of healthy food practices Increased access to more food options	Families are healthier Increased household food security

Determining What to Evaluate – Sample Nutrition Program



Process

Outcomes

PROBLEM	INPUTS	ACTIVITIES	OUTPUTS	Outcomes		
				Short-Term	Medium-Term	Long-Term
Families suffer from poor nutrition-related health problems and there is limited services available to better educate families and individuals on the importance of integrating healthy foods into their diets.	Funding Staff 200 AmeriCorps State and National members Research	Conduct educational workshops Provide nutrition and food prep counseling Provide referrals to food programs and resources	# individuals receiving education # individuals receiving services # individuals receiving referrals	Increased knowledge of healthy food choices Improved attitudes about healthy eating Improved skill in preparation of healthy foods Increased knowledge of food programs and community food resources	Increased adoption of healthy food practices Increased access to more food options	Families are healthier Increased household food security

Examples of Outcome Measures and Data Sources



	Outcomes		
	Short-Term	Medium-Term	Long-Term
Outcomes	Increased knowledge of healthy food choices	Increased access to more food options	Families are healthier
Measure	% ↑ individuals demonstrating greater understanding of benefits of good nutrition	% ↑ individuals enrolled in food assistance programs	% ↓ risk factors for nutrition related problems and chronic diseases
Data Source	Pre/post surveys of beneficiaries and a matched comparison group of non-beneficiaries	Administrative data records	Pre/post health records of beneficiaries and a matched comparison group of non-beneficiaries

Final Thoughts on Logic Models



- Developing a logic model is not completed in one session or alone.
- There is no one best logic model or model development process.
- Logic models represent intention.
- A program logic model can change and be refined as the program changes and develops.
- Logic models play a critical role in building the evidence base for a program.

Resources for Logic Model Development



- **AmeriCorps Evaluation Resources page (Logic Model Course, and other evaluation topics)**
 - <https://americorps.gov/grantees-sponsors/evaluation-resources>
- **W.K. Kellogg Foundation Logic Model Development Guide**
 - <http://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide>
- **Innovation Network Logic Model Workbook**
 - https://innonet.org/media/logic_model_workbook_0.pdf

Thank you!

Carrie E. Markovitz, Ph.D.

NORC at the University of Chicago

markovitz-carrie@norc.org

To contact the Office of Research and
Evaluation: evaluation@cns.gov



Peer Learning Memo

TO: Jehyra Asencio Yace, Emily McDonald, and Megha Patel, Office of Research and Evaluation, AmeriCorps

FROM: Eileen Graf, Jenni Scolese, and Carrie E. Markovitz, Task 2 Project Team, NORC

SUBJECT: *TA for Building and Using Evaluation Evidence* Project: Potential approaches to peer learning

DATE: November 2, 2022

Purpose

This memo describes the NORC team’s suggestions and recommendations for developing a peer learning approach for building grantee evaluation capacity on the *Technical Assistance for Building and Using Evaluation Evidence* project. Peer learning, the process of individuals learning with and from each other, has long been successfully¹ used as a learning format in secondary and post-secondary education. While it is well established in these educational contexts, much less is known about the use of peer learning in other fields, including in the public and private sector. Yet, peer learning has become an important technical assistance (TA) format deployed by the federal government² to support grantees at multiple levels: regional, state, territory, tribal, and local.

Peer learning refers to an educational strategy which sees individuals, or teams of individuals, sharing knowledge and experience with each other with the goal of applying this knowledge within their organizations. The knowledge shared is expected to increase organizational capacity to facilitate improved practices, policies, or systems. Peer learning is predicated on the assumption that practitioners possess valuable on-the-ground knowledge that is derived from implementation experience. This applied knowledge is situated within complex organizational contexts that may not transfer as well through universal written materials or through communications from state and federal governments or their contractors.

The various forms of peer learning formats often use different names. A recent OPRE report used the term “peer learning opportunities”³ as an umbrella term for the various formats used in the public policy context, including peer learning groups, forums, communities, communities of practice, learning circles, or peer-to-peer (P2P) opportunities. While concrete definitions may vary, common across these

¹ Tullis, J.G., Goldstone, R.L. Why does peer instruction benefit student learning?. *Cogn. Research* 5, 15 (2020). <https://doi.org/10.1186/s41235-020-00218-5>

² Baumgartner, S., Cohen, A. & Meckstroth, A. (2018). *Providing TA to Local Programs and Communities: Lessons from a Scan of Initiatives Offering TA to Human Services Programs*. Washington, DC: Office of the Assistant Secretary for Planning and Evaluation, U.S. Department of Health and Human Services.

³ Graf, E., Kubelka, J., Schwartzman, T., Hafford, C., Hernandez, M., & Rous, B. (2022). *A Study of Peer Learning Opportunities for CCDF Grantees: Final Report*. OPRE Report 2022-XXX. Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

formats are four stages that facilitate peer engagement and knowledge exchange. Andrews and Manning (2016)⁴, who researched peer learning in international contexts, describe these stages as:

1. Interaction Facilitation: bringing individual peers together
2. Knowledge Generation: promoting information and resources to share
3. Sharing and Exchange: fostering knowledge sharing among peers
4. Reflection, Application and Diffusion: supporting efforts to ensure that lessons learned by individuals are reinforced and applied

These stages are not necessarily sequential, and different peer learning opportunities may focus on only one or some of the stages. Depending on the specific approach to peer learning, some formats, such as P2P, involve little more than stage 1, while other formats, such as communities of practice, are focused primarily on stage 4.

Peer learning is a promising TA strategy that the NORC TA Team can build into its current Evaluation TA Portfolio across AmeriCorps programs, focus areas, grantee characteristics (small vs. large; new vs. established programs, low vs. high capacity grantees) and different evaluation designs. Based on NORC's understanding of the various peer learning formats, we recommend a "peer learning cohorts" approach for most AmeriCorps grantees. With this cohort approach, we would focus on small groups of 7-10 grantees who would learn with and from each other. The key value added through this approach is that evaluation topics should move from theoretical to applied with an emphasis on how what is learned can be utilized in different local contexts.⁵

Building Grantee Evaluation Capacity

Peer-to-peer model. Peer learning opportunities can range from low to high effort, depending on specific goals related to peer engagement, learning, and application. However, only one strategy, Peer-to-Peer (P2P), has been utilized by NORC thus far and involves relatively low effort by the TA provider (stage 1). These P2P opportunities often emerge organically through the TA providers' knowledge of numerous grantee contexts and needs, but they can also be established intentionally through TA offerings to grantees who may be seeking peer engagement. P2P is a relatively low effort TA strategy if the goal is related to stage 1: facilitating peer interaction.

While NORC has not previously made extensive use of peer learning as a TA strategy in general, we have used a P2P format in order to connect two tribal grantees and some environmental stewardship grantees. For the tribal grantees, both represented different chapters of the Navajo Nation who knew of each other but did not typically communicate. Given their work in the same community, as well as a similar approach to data collection, NORC facilitated a one-hour call with both grantees to establish a peer connection and to discuss one grantee's approach to developing a data collection instrument. Both grantees connected individually afterwards. Additionally, for the environmental stewardship grantees, NORC connected a more experienced grantee who had successfully completed an impact evaluation with two grantees who were interested in conducting an impact evaluation and wanted to know more

⁴ Andrews, M. & Manning, N. (2016). A Guide to Peer-to-Peer Learning. How to make peer-to-peer support and learning effective in the public sector? Prepared for the Effective Institutions Platform. Retrieved from https://www.effectiveinstitutions.org/media/The_EIP_P_to_P_Learning_Guide.pdf

⁵ Please note that there may be cost implications in implementing some of these activities on the project, depending on the strategy selected and the number of grantees affected.

about their process. Meetings between the grantees were not facilitated by NORC, but NORC introduced the grantee staff and shared evaluation plans and other materials.

Cohort model. Peer learning opportunities focusing on stages 2-4 depend heavily on TA provider facilitation with regards to the planning of the opportunity, peer selection, facilitation of knowledge generation, exchanges, planning, and application. These opportunities utilize a cohort model of 7-10 matched peers (grantees) per cohort. These peer learning supports align well with an implementation framework⁶ by focusing on:

1. Gathering knowledge
2. Action planning
3. Implementation supports

Very broadly, NORC can expand our support of peer learning in program evaluation within an implementation framework by focusing on the following topics:

1. Focusing on peers' knowledge building of evaluation topics (i.e., gathering knowledge);
2. Supporting peers in the development of an evaluation plan (i.e., action planning); and
3. Supporting peers in the implementation of their evaluation (i.e., implementation supports).

These three topics would all lend themselves to peer learning cohorts with 7-10 peers matched by either one or a combination of common characteristics, such as AmeriCorps program (ASN, Tribal AmeriCorps, Vista and ACS), focus area, population served, evaluation design, and/or similar commission (e.g., Puerto Rico). While the topics are sequential and cohorts could reasonably move together through all the topics, peer learning cohorts can be offered for almost any topic.

Cohort Models Using the SCALER

Peer learning across grantees and AmeriCorps program types could make use of AmeriCorps' SCALER tool as a framework to support all three topics. These opportunities would align with AmeriCorps' desire to enable the dissemination and use of the SCALER among grantees. Additionally, facilitated peer learning on SCALER topics might provide an opportunity for grantees who have previously reported that the SCALER is not meant for them (i.e., only for large grantees who have completed RCT studies) and require further outreach and education. Another advantage of using a peer learning approach to the SCALER is that NORC can work with multiple grantees at the same time, which, in this case, may be more appropriate than 1:1 TA, given the level and type of TA needed. Finally, through NORC's own continuous quality improvement work, we would be able to obtain grantee feedback on using the SCALER regularly and gather key insights on what works and what doesn't in our use of the SCALER as a TA tool.

Topic 1. Focusing on peers' knowledge building of evaluation topics

Topic 1 could be most useful for peers who demonstrate low evaluation capacity – perhaps some who are in their first competitive cycle, those who experienced recent turnover of key program staff, or formula grantees who are new to AmeriCorps. This form of peer learning would be designed to provide a foundation for building evaluation capacity. We suggest using the SCALER in two ways: first, to group

⁶ The National Implementation Research Network, Frank Porter Graham Child Development Institute, University of North Carolina (n.d.). Module 1, Framework 2: Implementation Stages | NIRN (unc.edu).

grantees of a similar level into a cohort and second, as a TA tool to establish a basic understanding of evaluation topics. Topic 1 enables us to include grantees across programs, focus areas, and designs. In this case, once these grantees move into their second cycle, they could progress to participating in the second topic (see below). Opportunities focused on Topic 1 are heavily facilitated by TA providers who provide structured content for each session.

Topic 1 may also be suitable to engaging commissions who are in need of building their knowledge of evaluation topics and AmeriCorps requirements around evaluation. A promising opportunity may be to involve commission staff from one state together with some of their sub-grantees to learn with and from each other as partners in a shared goal of ensuring program success. As with all peer learning opportunities, a state-plus-grantees cohort model requires input from AmeriCorps regarding the selection of candidate commissions and grantees as well as potential topics.

Topic 2. Supporting peers in the planning of an evaluation plan

Although Action Planning is typically a second stage in peer learning, it might be most efficient for NORC to initially focus on this second topic since this is fully aligned with the TA NORC already provides. We could offer such an opportunity to peer cohorts during their first grant year.

A more immediate opportunity to implement this approach is with 2022 grantees who were initially considered for 1:1 intensive TA but were not included in the final selection. This group of grantees would be well matched based on our assessment of their evaluation plan, and we would further match by topic, evaluation design, and SCALER assessment, assuming grantees are interested. We also suggest receiving input from the commissions (if applicable) and AmeriCorps about the selection of candidates.

Opportunities focused on Topic 2 are primarily facilitated by TA providers who provide structured content for each session. However, a key component of topic 2 is for peers to present on their own evolving evaluation plans. Please see the exhibit below for an example of a topic 2 opportunity. The information contained in this exhibit would be used to communicate the opportunity to potential grantees.

Exhibit 1: Sample Opportunity

Peer Learning Opportunity Description/Topic	Developing an AmeriCorps Evaluation Plan
Session Dates and Times	2-3:30 pm ET on the following dates: December 8, 2022 January 12, 2023 February 9, 2023 March 9, 2023 May 10, 2023
Application Deadline	November 9, 2022 at 6pm ET
More Information/How to Apply	Each grantee will complete a sign up document, including information about other team members, goals, and areas of interest and expertise. Further information and the application can be found here <insert url here>
Point of Contact	Jane Smith (jane.smith@gmail.com)

1

Approach to Peer Learning & Goals

What and how will peers be expected to learn?

- Peers are expected to learn how to plan an evaluation that meets AmeriCorps requirements
- Peers will learn how to use the AmeriCorps SCALER tool to build evaluation capacity

2

Participants & Team Composition

Will peers be expected to participate as a team or as individuals?

- Team participation of program director and evaluator is encouraged, but not a requirement

3

Peer Readiness to Participate

What level of peer readiness and capacity will foster successful participation in this opportunity?

- Some knowledge of evaluation topics
- Previous data collection planning experience

4

Facilitation Tools

What tools will the facilitator/s use to structure the peer learning opportunity?

- Sign-up documents to provide grantee context
- Video calls: Whole group sessions, Break-out rooms
- Assignments to be completed between sessions
- Resource repository with materials from facilitators and participants
- Feedback mechanism to provide facilitators with information about interests/needs
- Follow-up TA as needed (1:1 coaching)

5

Peer Learning Tools

What tools will the facilitator/s use to support peer learning?

- Presentations by subject matter experts and other peers
- AmeriCorps SCALER Tool

6

Expectations for Participation

How will peers engage with the opportunity?

- Peer/team attendance at all sessions is expected
- Active participation: grantees to share expertise and experiences

Adapted from Graf, E., Kubelka, J., Schwartzman, T., Hafford, C., Hernandez, M., Rous, B. (2022). Peer Learning Toolkit, OPRE Report 2022-xxx, Washington, DC: Office of Planning, Research and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

Topic 3: Supporting peers in the implementation of their evaluation

The third topic might be highly relevant to peers who are in the process of carrying out an evaluation. Opportunities could focus on the implementation of any design, but within a given priority area or focus

on a target population. At this stage, peer learning is highly driven by peer needs, and the TA providers focus on facilitating the meeting and providing expert advice when the situation arises. Peers drive the agenda and the conversation to focus on self-identified issues during the implementation, analyses, and reporting phases of their evaluations. While peer driven, this type of TA will still be highly facilitated and monitored by NORC to ensure that participants are offering accurate guidance and feedback and all participants are able to learn.

Recommendation

Peer learning opportunities present the NORC team with the possibility of expanding on our 1:1 intensive TA by providing tailored peer learning opportunities to one or two cohorts of 7-10 peers. During Option Year 1, we suggest involving grantees who were considered, but not selected, for intensive TA in a peer learning opportunity focused on developing and finalizing their evaluation plans, as specified in Exhibit 1.

Recommendation Memo

TO: Jehyra Asencio Yace and Emily McDonald, Office of Research and Evaluation, AmeriCorps

FROM: Cristina Carrazza, Eileen Graf, Lisa Lee, and Carrie Markovitz, NORC

SUBJECT: *TA for Building and Using Evaluation Evidence* Project: Task 6

DATE: June 7, 2022

For Task 6 of the *Technical Assistance for Building and Using Evaluation Evidence* project, NORC at the University of Chicago is tasked with pilot testing, validating, and translating the AmeriCorps Organizational Capacity Assessment Tool (OCAT) for use by AmeriCorps grantees. In addition, this work entails creating alternative versions of the AmeriCorps OCAT¹ that are appropriate for use by Tribal (TOCAT) and Spanish-speaking grantees (SOCAT). This memo documents the processes utilized by NORC in completing a review of the literature on capacity building instruments, a review of the AmeriCorps OCAT and the materials related to its development, and our conclusions and recommendations for revisions to the AmeriCorps OCAT based on our findings.

Background Research to Inform AmeriCorps OCAT Revisions

NORC conducted a literature review to inform revisions to the AmeriCorps OCAT. We attempted to replicate the search conducted by the contractor who developed the first version of the AmeriCorps OCAT and searched for information on validated organizational capacity tools. Additionally, we included terms to search for instruments and articles that may be relevant for assessing the capacity of Spanish-speaking and tribal grantees.

The background research included a review of existing instruments and the extant literature to identify studies validating these and other available instruments. The instruments we reviewed can be categorized as “tools” or “measures.” *Tools* are intended to be used formatively by organizations to support their own incremental capacity development. *Measures* are used summatively to numerically assess an organization’s level of capacity. In this memo, we differentiate between tools and measures, and we use the term “instrument” to be inclusive of both tools and measures.

¹ Because the OCAT AmeriCorps developed shares its name with a tool developed by McKinsey, we differentiate between the two in this memo by prefacing each use of the term with the respective organization, i.e., McKinsey OCAT or AmeriCorps OCAT.

Our initial review of the literature on capacity building suggests that there are virtually no field-tested or validated organizational capacity instruments². There were no readily available technical reports that detail the development or validation for most capacity instruments identified. Instruments vary in terms of length and scope, and although they do not measure the same capacity constructs, there is a fair amount of overlap. Further, many of these instruments require an external facilitator for completion, which limits their applicability.

In addition to our search for general capacity building instruments, we also examined the literature for capacity tools for special populations or groups. Unfortunately, our literature search on organizational capacity tools did not return anything relevant to adaptations or revisions to the AmeriCorps OCAT for Spanish-speaking and tribal grantees.

Currently Available Organizational Capacity Instruments

Based on our review of the literature, there are two instruments currently available that closely align with the AmeriCorps OCAT. Below is a summary of their strengths and limitations.

Organizational Assessment Tool (OAT)³

- Formative “tool” that can be completed multiple times over the life cycle of an organization to provide feedback on changes over time in the organization’s capacity
 - Provides clear feedback and actionable steps for organizations to build capacity, especially those with low-capacity scores
 - Strength-based feedback approach
- Based on McKinsey’s OCAT (Version 2.0)
- Technical report is not readily available
- No information on development or validation

Nonprofit Capacities Instrument (NCI)⁴

- “Measure” that provides a summative score determining an organization’s level of capacity
- Tested with a sample of organizations in Illinois, Costa Rica, and Uruguay

² Despard, M. R. (2017). Can nonprofit capacity be measured? *Nonprofit and Voluntary Sector Quarterly*, 46(3), 607-626.

³ [Organizational Assessment Tool \(OAT\)](#)

⁴ Shumate, M., Cooper, K. R., Pilny, A., & Pena-y-lillo, M. (2017). The nonprofit capacities instrument. *Nonprofit Management and Leadership*, 28(2), 155-174.

- NCI item pool was constructed from existing capacity instruments
- Peer-reviewed report of development and validation available (Shumate et al., 2017)³
- Assumes organizations have a “basic-level” of capacity (e.g., organization has a Board of Directors, etc.)

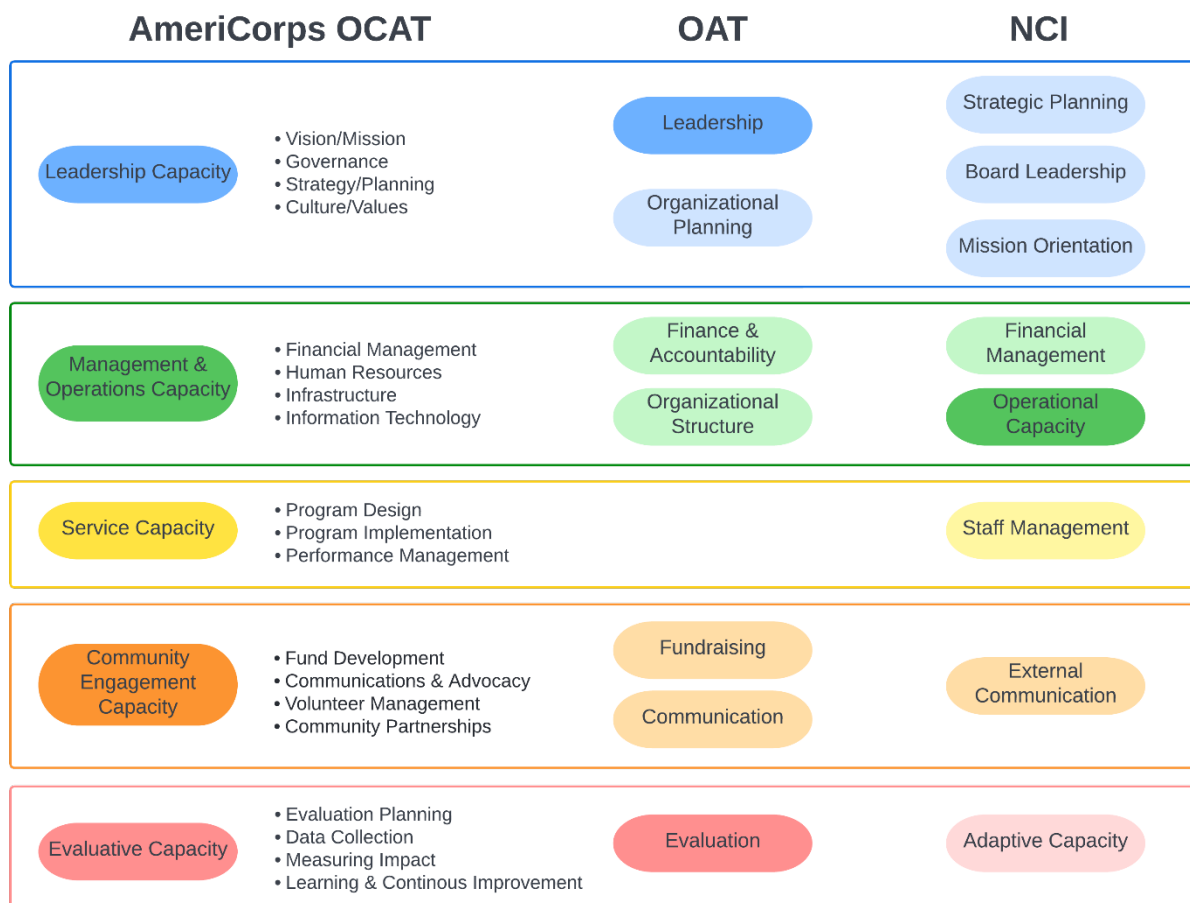
Comparing AmeriCorps OCAT to OAT and NCI

Although several of the capacity building instruments that we identified varied in terms of the breadth and depth of the capacity domains they assess, several instruments appear to be derived from the same initial instrument (including the AmeriCorps OCAT): the Organizational Capacity Assessment Tool (OCAT 2.0) developed by McKinsey.⁵

Figure 2 compares the capacity constructs assessed in the AmeriCorps OCAT with those in the OAT and NCI. The AmeriCorps OCAT measures five capacity dimensions, each with several subdomains which are outlined in bullets. The shading in the OAT and NCI domains represents their degree of overlap with the AmeriCorps OCAT capacity dimensions. Community Engagement Capacity, which includes Volunteer Management, and Evaluative Capacity are dimensions of particular relevance to AmeriCorps and have been incorporated into the AmeriCorps OCAT. Of those dimensions, only Evaluative Capacity is assessed in other instruments.

⁵ [The Organizational Capacity Assessment Tool \(OCAT\): 2.0](#)

Figure 1. Capacity Domains Comparison



Review of AmeriCorps OCAT

In addition to the literature review, NORC completed a review of the AmeriCorps OCAT and the materials related to its development. Our review revealed a number of issues related to the tool's development, functionality, and testing.

Development

There is limited documentation describing the development of the AmeriCorps OCAT, which makes it difficult to understand why certain items and domains were included in the assessment. Further, there is no conceptual framework that supports either the purpose or the design of the AmeriCorps OCAT.

The literature review conducted prior to AmeriCorps OCAT development summarizes all capacities that were of interest but does not provide a justification for how the current assessment was built on the basis of the extant research. Further, the current version of the AmeriCorps OCAT does not appear to address some of the concerns identified with other assessment tools, such as McKinsey's OCAT (Version 2.0). For example, some of the burden factors of the McKinsey tool noted in the literature review include the use of subjective questions, a lack of a verification process, and a limited follow-up that only includes a results debrief. Our review of the AmeriCorps OCAT suggests that these limitations were not addressed in the current version.

Functionality

The feedback tied to specific AmeriCorps OCAT scores is broad and does not align with the capacity domains. The scores do not yield a summary of the grantee's results nor provide any suggestions on specific areas that should be prioritized for capacity development. The tool also does not map out any concrete next steps for the grantee to increase their capacity. Unlike AmeriCorps' SCALER tool, which incrementally builds an evidence portfolio to facilitate scaling, the AmeriCorps OCAT does not provide stepping stones into capacity building, which limits its usefulness to new organizations or those that are beginning their capacity building trajectory.

Further, the associated recommendations provide links to books sold on Amazon or other resources, some of which are likely outdated. This puts the onus on the grantee to understand how their responses correspond with the provided resources and to figure out their own next steps.

Testing

The available documentation suggests minimal testing was conducted during the development of the AmeriCorps OCAT. Cognitive testing included only a small sample of three respondents. Pilot testing also had low levels of participation. Pilot data was requested from 50 organizations, but only nine organizations completed the assessment. It is also not clear what changes, if any, were made based on the testing. The lack of extensive testing raises concerns about the content validity of the AmeriCorps OCAT.

Recommendations for a Capacity Instrument

Considerations

To provide recommendations to AmeriCorps' Office of Research and Evaluation (ORE) on revisions/updates to the AmeriCorps OCAT, it is important to determine whether it will be used as a measure or a tool, as defined earlier in the memo. A tool and a measure serve very different purposes, which is reflected in the steps needed to develop either instrument.

A capacity **tool** provides formative and actionable feedback to organizations on how to incrementally build capacity based on their current levels (similar to the SCALER). A tool is focused on identifying areas for improvement using a diverse set of items/questions. A tool can be used to tailor resources and technical assistance (TA) in support of capacity building. It does not need to be psychometrically validated. Tool development includes the following steps:

1. Conceptual framework and item development
2. Expert input and revision
3. Cognitive interviewing and revision
4. Usability testing and revision

A capacity **measure** is a summative scale to measure capacity as well as changes in capacity as a function of intervention. A measure is focused on assessing differences in capacity over time or between organizations using a narrow set of items/questions. A measure can be used as a research instrument to measure impact/outcomes in capacity. The development of a measure requires psychometric validation. Measure development includes the following steps:

1. Conceptual framework and item development
2. Expert input and revision
3. Cognitive interviewing and revision
4. Piloting/field testing and psychometric analyses
5. Revision and 2nd wave of field testing (as necessary)

NORC's Recommendation for Development of a "Capacity Screener Tool"

Based on conversations with ORE, both a capacity tool and a capacity measure may be needed by AmeriCorps, requiring two separate development processes and resulting instruments. ORE also has communicated the urgent need in the field for a capacity assessment instrument, so there is a desire to develop something quickly for more immediate use by the field. Based on this understanding and the need to develop a capacity tool by the end of the contract base year (September 29, 2022), we propose developing a Capacity Screener Tool that can be used to categorize grantees in terms of their existing capacity and potential TA needs. This tool will be an abbreviated and adapted version of the validated NCI with some additional revised items from the AmeriCorps OCAT to cover all of the major capacity dimensions. We estimate that the tool will contain between 20 and 30 self-guided questions across the five capacity dimensions detailed above, including Community Engagement Capacity, Volunteer Management, and Evaluative Capacity.

The resulting capacity tool will allow organizations to self-identify their general level of capacity as defined by three potential categorizations: 1) emergent (low capacity), 2) growing (medium capacity), or 3) stable (high capacity). Results from this screener can be used to quickly identify grantees with organizational capacity needs, so they can receive appropriate resources and/or TA support. If the results of the screener tool show a

high level of capacity, an organization will be encouraged to utilize the SCALER tool, given its appropriateness for assisting higher capacity grantees.

By the end of the base year, we will develop a draft of the Capacity Screener Tool. We hope to have the tool ready for pilot testing in Fall 2022 at the beginning of the second year of the contract. If the tool appears to be useful to the AmeriCorps field based on feedback from the pilot, we then will consider with ORE whether to expand the tool into a more detailed assessment instrument and/or develop a separate instrument for measuring capacity change over time among grantees.

Sample 3. Region 16 Comprehensive Center Year 3 Impact Story, Alaska Impact Story



REGION 16 COMPREHENSIVE CENTER YEAR 3 IMPACT STORY

IMPROVING EQUITABLE ACCESS TO EVIDENCE-BASED READING STRATEGIES IN ALASKA

Region 16 Comprehensive Center and the Alaska Department of Education & Early Development are building a foundation for early literacy in Alaska through effective, accessible tools, and enriched educator capacity.

Background

In 2016, the Alaska State Board of Education reviewed and accepted 13 recommendations bundled as Alaska's Education Challenge. In 2022, the Alaska Reads Act was signed into law. The Act addresses the number one priority of Alaska's Education Challenge, which is to support all students to read at grade level by the end of third grade. The Department of Education & Early Development (DEED) is responsible for supporting and training teachers of pre-kindergarten through third grade, curriculum specialists, and other educators to implement evidence-based strategies for teaching reading.

To meet the requirements of The Alaska Reads Act, schools across Alaska must have access to professional development (PD) and evidence-based reading resources. In 2019, DEED approached Region 16 Comprehensive Center (R16CC) for help.

The R16CC approach

Region 16 Comprehensive Center is one of 19 Regional Comprehensive Centers funded by the U.S. Department of Education. Our center was created in 2019 to help state education agencies in Alaska, Oregon, and Washington implement their plans for the Every Student Succeeds Act.

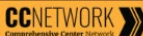
As a consortium of 29 educational service districts, we engage state, regional, Tribal, school, and community partners to create the conditions for students, educators, and communities to learn and thrive.

We are a lean team of passionate, energetic professionals. We live and work in the communities we serve and strive to create tailored, timely educational resources that meet each community's unique needs. We evaluate and implement evidence-based practices in service of our region, and we collect evidence around new, innovative practices to inform our next steps.

Our team disrupts typical power structures by working in a non-hierarchical, collaborative model. We share stewardship and aim to exist in reciprocal relationship with the agencies and communities we serve. We also cultivate an extensive network of external specialists to deepen our knowledge, experience, and capacity.

Relationships are at the heart of what we do: There is, after all, no transformation without collaboration.

1 Impact Story: Improving Equitable Access to Evidence-Based Reading Strategies in Alaska

CCNETWORK
Comprehensive Center Network
REGION 16
Alaska
Oregon
Washington

Collaborators

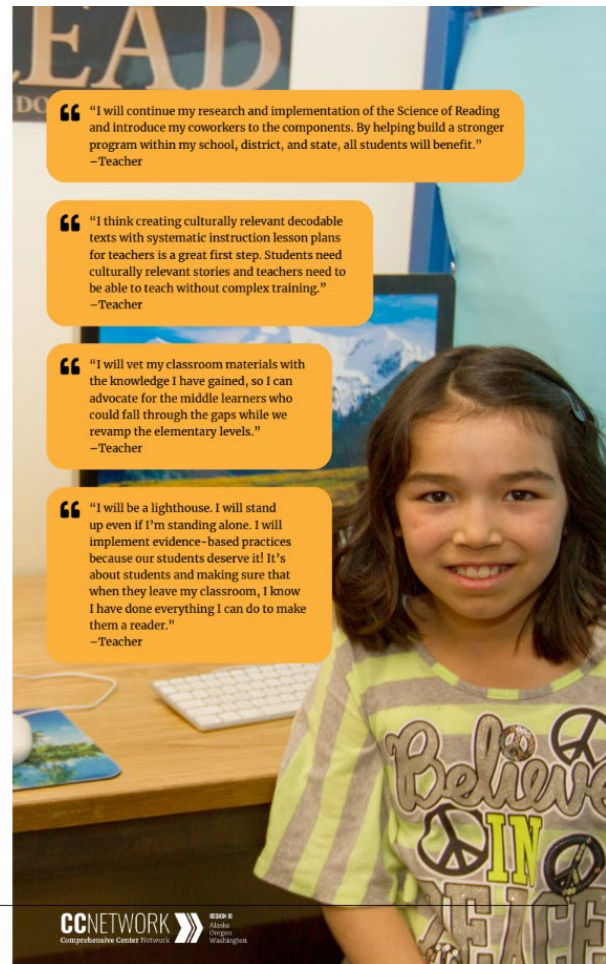
- R16CC
- DEED

Outputs

One of the first challenges DEED and the R16CC team addressed was how to provide equitable access to PD across the vast state. They worked to identify strategies and create an implementation plan resulting in:

- **Enhancements to the DEED website**, including expanded access for remote schools, and additional education resources for teachers, administrators, students, and their families
- **Creation of a virtual platform to deliver training webinars**, with 34 delivered to date
- **Development and implementation of a robust evaluation process** to gather participant feedback post-event and apply learnings to future events
- **Co-creation of mission-critical resources** including *Alaska's Reading Playbook*, accompanied by six recorded webinar sessions, slide decks, and a facilitator's guide
- **Co-development and launch of [AKLearns.org](https://www.aklearns.org)**, a teaching and learning support site offering information, resources, and leadership coaching to educators across Alaska
- **Collaboration with national education experts to offer high-interest events** that support improvement in reading achievement, including a six-week virtual book study that featured several renowned authors, provided unparalleled access to research-based content, and attracted educational service district staff from across three states

2 **Impact Story:** Improving Equitable Access to Evidence-Based Reading Strategies in Alaska



Key impacts

Results of the work completed to date have been felt across Alaska, and include **better-equipped literacy educators and stronger relationships and trust with teachers in remote communities**. As evidence of this trust, when schools were closed during the COVID-19 pandemic, educators in remote communities approached R16CC and DEED, asking them to provide professional development on how to teach early literacy remotely. Many webinar participants have expressed their view of R16CC and DEED as experts in adult learning—building new knowledge in optimal ways while bolstering educators' confidence to apply that knowledge.



34 webinars, **2,000** people
(so far)



95% of participants said webinar
content and materials were high-
quality, useful, and relevant



87% of participants reported
increased knowledge they can
apply in their classrooms



41,000+ visits to the
[AKLearns.org](https://aklearns.org) website since 2021

Reflection and next steps

Ongoing evaluation is essential to ensure continued improvement and measure the progress toward the goals set forth in Alaska's Education Challenge and the requirements of the Alaska Reads Act. The evaluation effort gathers individual school-level data and data from teachers, administrators, and families, and is used to inform next steps, make adjustments, and celebrate achievements.

School improvement is another initiative that R16CC, DEED, and partners work on that include literacy components. School improvement approaches and efforts are customized to meet the needs of diverse settings by identifying and tackling barriers to implementation.

[AKLearns.org](https://aklearns.org) continues to be a source of asynchronous learning opportunities through recorded sessions. Teachers, students, families, and administrators have access to focused learning resources. Live webinar series continue to be offered each year by R16CC and DEED staff.



Sample 4. COHORT LEARNING: Strengthening Support for Native Education in Washington



| CONTEXT

NECP at UW

The Native Education Certificate Program (NECP) at the University of Washington is designed to address the historical educational challenges AI/AN students face by equipping educators with skills to create culturally sustaining curricula. This two-year, online program combines coursework on topics such as Tribal sovereignty and Native child development with hands-on projects in participants' communities. The program aims to bridge the gap between educators and Tribal communities, fostering a deeper understanding of Native cultures and enhancing the educational experiences of Indigenous students by integrating Tribal histories and traditions into the curriculum.

"The course activities and readings have provided me with a clear vision of culturally relevant ways to engage Native learners, and more importantly, develop mutually reinforcing partnerships with Native communities. I have used the resources in beginning conversations and will continue to do so, as well as share [them] with other ESD staff."
- Region 16-sponsored NECP cohort member

| CONTEXT

Opportunities to Strengthen Native Education in Washington

Despite one in 25 students in Washington identifying as American Indian or Alaska Native (AI/AN), many Indigenous students and families feel disconnected from the education system. Native students rarely see their identities, cultures, or histories reflected in established curricula. Further, traditional curricula often reinforce settler-colonial narratives, marginalizing Native histories and perspectives. This lack of representation impacts students' sense of belonging, leading to lower engagement, attendance, and graduation rates.

The Native Education Certificate Program at the University of Washington equips educators with skills to create inclusive, culturally sustaining curricula that reflect Native students' identities, cultures, and histories.

"Through strategic planning with the Center, we are growing our internal expertise state-wide [through the] Native Education Certificate Program. We believe the work achieved to date has significantly enhanced our partnerships and built trust, laying the foundation for effective systemic change for Native students in our state."
- Washington SEA leader

| HIGHLIGHTS

CCNETWORK
Comprehensive Center Network

REGION 16
Snohomish
County
Washington

Washington Office of Superintendent of
PUBLIC INSTRUCTION



Click on the + to read more information.

Capacity-Building Approach +

Culminating Projects +

Progress to Date +

"As a Native educator, it's been great to see my non-Native colleagues across the educational spectrum learn various aspects about Native history and culture, Native learning styles, and communicating with Native families, embracing ways to support curriculum that better serves all students regarding Native life (both historical and contemporary)."
- Region 16-sponsored NECP cohort member

INSIGHTS

REGION 16 STAFF ESD LEADERS NECP DIRECTOR



"The more educators who immerse themselves in this program and have an opportunity to rethink what, why, and how our educational systems operate, the closer we are to an educational environment [...] that enhances the lived experience of children in our state. We are changing the landscape of our education system. The more people we can engage in this learning from different areas of our communities, the better."
—Region 16 Washington State Director

Staff have reflected that this program is making significant strides in enhancing educational practices. This innovative approach not only improves the system but also fosters greater community involvement, leading to a more inclusive and effective educational environment.

RESOURCES

For more information, check out these resources from Region 16 and the Washington Office of Superintendent of Public Instruction:

NECP RESOURCES

- Booklet | A Cohort for Change: How Leaders from Washington's ESDs are Building Capacity and Supporting Native American Students
- One-Pager | NECP Project Fair Learning Gems
- Blog | Second Region 16 Cohort in the NECP Completes First Year
- Blog | Deepening Connections Across Cohorts: Region 16 Native Education Certificate Program Participants Connect on Sustaining Projects
- Blog | Native Education Certificate Program Ready for Next Wave of Educators

SUPPORTING NATIVE EDUCATORS

- PNW FIRE | Pacific Northwest Finder for Indigenous Resources in Education
- Report | Indigenous School Improvement Research Findings
- Brief | Recruiting and Retaining Indigenous Educators for School and District Leaders
- Brief | Recruiting and Retaining Indigenous Educators for Grow Your Own Programs
- Brief | Recruiting and Retaining Indigenous Educators for Teacher Education Programs

SUPPORTING NATIVE STUDENTS

- Video Series | Career & Skill Development for Native Students
- Report | Foundations of Indigenous Education in the Pacific Northwest
- Report | National Native Tuition Waiver Study

The contents of this digital impact story were developed under a grant from the Department of Education. However, the contents do not necessarily represent the policy of the Department of Education, and you should not assume endorsement by the federal government. This work has been created in partnership with the Region 16 Comprehensive Center.

