Applicants must respond to each question/item in each section of the application. Incomplete applications will not be considered.

**Electronic Application Process**

Applicants are required to complete and submit the application, including all required attachments to:

**MDE-SSOS@michigan.gov**

Applications will be received on an ongoing basis and will be reviewed in the order in which they are submitted.

Applicants must respond to each question/item in each section of the application. Incomplete applications will not be considered.

Technical support will be available Monday – Friday, from 9:00 a.m. – 4:00 p.m.

All information included in the application package must be accurate. All information that is submitted is subject to verification. All applications are subject to public inspection and/or photocopying.

**Contact Information**

All questions related to the preferred provider application process should be directed to:

Mark Coscarella  
Interim Supervisor  
Office of Education Improvement & Innovation  

OR  

Anne Hansen or Bill Witt  
Consultants  
Office of Education Improvement & Innovation

Telephone: (517) 373-8480 or (517) 335-4733  
Email: MDE-SSOS@michigan.gov
Under the Final Requirements for School Improvements Grants, as defined under the Elementary and Secondary Education Act of 1965, as amended, Title I, Part A. Section 1003(g) and the American Recovery and Reinvestment Act as amended in January 2010, one of the criteria that the MDE (SEA) must consider when an LEA applies for a SIG grant is the extent to which the LEA has taken action to “recruit, screen, and select external providers...”. To assist LEA’s in this process, the MDE is requesting information/applications from entities wishing to be considered for placement on a preferred provider list that will be made available to LEA’s on the MDE website. If an LEA selects a provider that is not on the list, the provider will have to go through the application review process before engaging in the turnaround intervention at the LEA. Applications will be reviewed on their merits and not on a competitive basis. Please note that the application and accompanying attachments will be accessible online to LEA’s seeking to contract for educational services.

Preferred external providers will be required to participate in a state-run training program that specifies performance expectations and familiarizes providers with state legislation and regulations. External providers will be monitored and evaluated regularly and those who are not getting results will be removed from the preferred provider list.

All decisions made by the MDE are final. There is no appeal process.

Please note that being placed on the Preferred Provider List does not guarantee that a provider will be selected by an LEA to provide services.

Two or more qualified reviewers will rate the application using the scoring rubric developed by the Michigan Department of Education (MDE).

Applications will only be reviewed if:

1. All portions of the application are complete;

2. All application materials, including attachments, are submitted electronically prior to the due date;

Applications will only be approved if:

1. The above conditions are met for review;

2. The total application score meets a minimum of 70 points
<table>
<thead>
<tr>
<th>Exemplar</th>
<th>Total Points Possible</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Description of comprehensive improvement services</td>
<td>25</td>
</tr>
<tr>
<td>2. Use of scientific educational research</td>
<td>15</td>
</tr>
<tr>
<td>3. Job embedded professional development</td>
<td>15</td>
</tr>
<tr>
<td>4. Experience with state and federal requirements</td>
<td>15</td>
</tr>
<tr>
<td>5. Sustainability Plan</td>
<td>15</td>
</tr>
<tr>
<td>6. Staff Qualifications</td>
<td>15</td>
</tr>
<tr>
<td><strong>Total Points Possible</strong></td>
<td><strong>100</strong></td>
</tr>
<tr>
<td><strong>Minimum Points Required for Approval</strong></td>
<td><strong>70</strong></td>
</tr>
</tbody>
</table>

**Note:** Applicants may apply to become preferred providers in all or some of the program delivery areas listed in Section B. If applicant does not wish to become a provider in a program area, that should be noted on the application.

If an applicant is applying to be a preferred provider in less than the five areas listed, they must have a review score not less than the following in each area for which they apply:

- Section 1 15 points
- Section 2 10 points
- Section 3 10 points
- Section 4 10 points
- Section 5 10 points
- Section 6 10 points  Section 6 must be completed by all applicants.
The Application is divided into four sections.

**Section A** contains basic provider information.

**Section B** requests information related to six exemplars (program delivery information and staff qualifications). Responses in Section B must be in narrative form. You may include figures (e.g., tables, charts, graphs) to support your narrative, but such items will be counted toward applicable page/word limits.

**Section C** contains the Assurances. Please read each statement carefully. By submitting your application, you certify your agreement with all statements therein.

**Section D** Attachments
### SECTION A: BASIC PROVIDER INFORMATION

Please enter the requested information in the spaces provided. Be sure to read all notes, as they provide important information.

**Instructions:** Complete each section in full.

<table>
<thead>
<tr>
<th>1. Federal EIN, Tax ID or Social Security Number</th>
<th>2. Legal Name of Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The Institute for Research and Reform in Education, Inc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Name of Entity as you would like it to appear on the Approved List</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Institute for Research and Reform in Education (IRRE)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4. Entity Type:</th>
<th>5. Check the category that best describes your entity:</th>
</tr>
</thead>
<tbody>
<tr>
<td>For-profit</td>
<td>Business</td>
</tr>
<tr>
<td>X Non-profit</td>
<td>Community-Based Organization</td>
</tr>
<tr>
<td></td>
<td>Educational Service Agency (e.g., RESA or ISD)</td>
</tr>
<tr>
<td></td>
<td>Institution of Higher Education</td>
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<tr>
<td></td>
<td>School District</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td>(specify): Reform Support Organization and Technical Assistance Provider</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>6. Applicant Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Contact</td>
</tr>
<tr>
<td>Jan Nevin</td>
</tr>
<tr>
<td>Street Address</td>
</tr>
<tr>
<td>25 South Shore Drive</td>
</tr>
<tr>
<td>E-Mail</td>
</tr>
<tr>
<td><a href="mailto:jnirre@aol.com">jnirre@aol.com</a></td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>7. Local Contact Information (if different than information listed above)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Contact</td>
</tr>
<tr>
<td>NA</td>
</tr>
<tr>
<td>Street Address</td>
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<td></td>
</tr>
<tr>
<td>E-Mail</td>
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<tr>
<th>8. Service Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>List the intermediate school district and each individual district in which you agree to provide services. Enter “Statewide” ONLY if you agree to provide services to any district in the State of Michigan.</td>
</tr>
</tbody>
</table>

X Statewide

<table>
<thead>
<tr>
<th>Intermediate School District(s):</th>
<th>Name(s) of District(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. Conflict of Interest Disclosure</td>
<td></td>
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<tr>
<td>-----------------------------------</td>
<td></td>
</tr>
<tr>
<td>Are you or any member of your organization currently employed in any capacity by any public school district or public school academy (charter school) in Michigan, or do you serve in a decision making capacity for any public school district or public school academy in Michigan (i.e. school board member)?</td>
<td></td>
</tr>
<tr>
<td>☐ Yes</td>
<td>X No</td>
</tr>
<tr>
<td>What school district are you employed by or serve:</td>
<td></td>
</tr>
<tr>
<td>In what capacity are you employed or do you serve (position title):</td>
<td></td>
</tr>
</tbody>
</table>

*IRRE currently provides education reform support and technical assistance to the Van Dyke Public School system in Warren, MI as part of a grant from the United Way for Southeastern Michigan. This grant is to implement small learning communities, instructional improvement, family and student advocacy and leadership development. IRRE is not employed by Van Dyke Public Schools nor do any of our staff or consultants serve in a decision-making capacity. We are funded by and answerable to the United Way.*

Schools or school districts are encouraged to apply to become preferred providers. However, the school or school district may not become a preferred provider in its own district. This restriction does not apply to Intermediate School Districts or Regional Educational Service Authorities.

**IMPORTANT NOTE: Once approved, providers must operate within the information identified in this application.**

Changes in application information may be requested in writing to MDE. The request must include the rationale for the changes. All changes must receive written approval from MDE prior to implementation and will be determined on a case-by-case basis. This includes, but is not limited to, information changes in the following categories:

- Change in service area
- Change in services to be offered
- Change in method of offering services
SECTION B: PROGRAM DELIVERY AND STAFF QUALIFICATION NARRATIVES

Instructions: Section B responses must be in narrative form. Provide data/documentation of previous achievements where applicable. All responses must comply with stated page limits. Figures such as tables, charts and graphs can be included in the narrative, but such information will be counted toward page limits. Text and figures beyond the stated page limit will not be considered and should not be submitted with the application. All references must be cited.

Exemplar 1: Description of Comprehensive Improvement Services (25 points possible)

Describe how comprehensive improvement services that result in dramatic, documented and sustainable improvement in underperforming urban secondary schools will be delivered to LEA’s that contract for your services. Comprehensive services include, but are not limited to the following:

- Support systems to ensure student and teacher success and sustain improvement
- Content and delivery systems and mechanisms proven to result in dramatic and sustained improvement linked to student achievement
- Job embedded professional development at leadership, teacher and support levels to increase internal capacity for improvement and sustainability linked to student achievement
- Comprehensive short cycle and summative assessment systems to measure performance and goal attainment linked to the building school improvement plan.
Exemplar 1 Narrative Limit: 4 pages (insert narrative here)

For the past 14 years, IRRE has supported the implementation of evidence-based reform strategies that make up our comprehensive reform framework First Things First. These strategies (described below) have produced dramatic, positive improvements in student achievement, graduation, dropout and attendance (see Exemplar 2 for evidence). Districts and schools can sequence and combine the First Things First core strategies in different ways, based on assessments of their needs, and participate in strategic consultation, on-site trainings, multi-day site visits and embedded professional development, and teleconference support from our specialized teams of experts. We begin with a description of our support system for embedded professional development (PD) followed by the available content of those PD sessions. The sample timeline presented assumes we can begin work together in the summer but will shift as needed depending on project start date and each school’s calendar (e.g., some schools begin with a planning year). We then provide information on how we build the capacity of system leaders to sustain reforms and to use data to inform the implementation of strategies linked to student success.

IRRE Embedded Professional Development Support System

<table>
<thead>
<tr>
<th>Timeframe &amp; Activity</th>
<th>Description of IRRE Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer and 1st Quarter, Year 1: Initial meetings, constituency building, and leadership training</td>
<td>Our partnership with a school/district begins with a needs assessment visit conducted during a 2-day site visit as soon as possible once IRRE is selected as an external vendor. IRRE meets with building and district (if appropriate) leadership as well as key constituents (teachers, students, union, community members, support staff) and conducts interviews and observations of classroom practice to assess the current status of student outcomes, teaching and learning, improvement supports and reform capacity. IRRE and building leaders create shared commitments to school improvement strategies selected in accordance with the school’s improvement plan. During the first quarter and then ongoing as needed throughout our partnership (1-3+years), building and district leaders teamed with IRRE staff meet with representatives from key constituencies to build knowledge/engagement and to articulate shared commitments to implementation of strategies. 2 4-day leadership trainings on using IRRE’s classroom visit protocol to collect data on teaching and learning; and use data for action planning (see details below).</td>
</tr>
<tr>
<td>Summer Prior to Year 1: Initial faculty training</td>
<td>IRRE provides a 3-day professional development training on the reform strategies being implemented. IRRE trainings incorporate effective pedagogy including presentation of new content, modeling and practice of new content knowledge/instructional strategies, and facilitation of peer dialogue. These trainings are continued each summer throughout IRRE’s relationship with the school; content of these trainings is determined by ongoing assessments in combination with building leadership recommendations.</td>
</tr>
<tr>
<td>1st Quarter, Year 1: Site visit #1 (job-embedded professional development) and conference calls</td>
<td>IRRE trainings are followed by a multi-day site visits (typically 2-3 day site visits per semester) to provide job-embedded professional development for instruction and advocacy, ongoing group and one-on-one coaching and modeling, and classroom observations to collect data on implementation of new instructional strategies. Site visits always include meetings with building/instructional leaders where data from classroom observations is used to inform next steps for further development and to build leaders capacity to sustain the new strategies. Though the content of these visits will vary depending on the number and complexity of reform strategies being implemented, they follow a regular structure so everyone knows what to expect. Bi-monthly conference calls further support implementation of strategies. The content of the calls is based on previous trainings and site visits as well as emerging challenges in the ongoing work. They collaboratively address the work and establish next steps both at the school and by IRRE.</td>
</tr>
<tr>
<td>Quarter, Year</td>
<td>Site visits, Trainings, and Bi-monthly Conference Calls</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------</td>
</tr>
</tbody>
</table>
| 2nd Quarter, Year 1: Site visit #2, leadership retreat, and conference calls | 3-day site visit including job embedded-PD for instruction and advocacy; collection and use of classroom data to inform action planning; build capacity of leaders to support reform.  
1-day leadership retreat to build capacity of reform leaders to support, sustain, and expand reform strategies.  
Bi-monthly conference calls |
| 3rd Quarter, Year 1: Site visit #3, training #2, and conference calls | 3-day site visit including job embedded PD for instruction and advocacy, use of data to inform action planning and building leader capacity to sustain reform.  
If PD time is available and resources allow, a 1-day training is provided to continue and expand the work.  
Bi-monthly conference calls |
| 4th Quarter, Year 1: Site visit #4, leadership retreat, and conference calls | 3-day site visit including job embedded PD for instruction and advocacy, use of data to inform action planning and building leader capacity to sustain reform.  
1-day leadership retreat to review annual data and plan PD sessions for next year.  
Bi-monthly conference calls |
| Year 2 and Ongoing | The same basic supports – starting with a summer instructional institute, followed by four three-day site visits for embedded PD, bi-monthly conference calls, and leadership meetings/retreats as needed – are recommended for future years, built on student outcome data and use of engagement, alignment and rigor in the classrooms. |

**Content of Embedded Professional Development and Mechanisms Linked to Improvement in Student Achievement**

Below are descriptions and associated embedded PD offerings for each of our core strategies. Trainings, site visits, and leadership sessions as described above can incorporate any combination of these offerings:

**Strengthening instruction.** Three overarching, research-based goals shape IRRE’s approach to instructional improvement: (1) **Engagement:** Students are actively involved - cognitively, emotionally, and behaviorally - in their academic work. (2) **Alignment:** Students are doing work that reflects academic standards set by their district and state and have opportunities to master the methods used on their state’s high-stakes assessments. (3) **Rigor:** Teachers expect and support high levels of work, at or above grade level, from all students. IRRE focuses on improving all teachers’ instruction and on developing instructional leaders through real-time coaching and effective use of data in the following areas:

- **Increase teachers’ instructional repertoire** around engagement strategies; differentiating instruction for ELL, advanced, special education, and struggling students; alignment of instruction with curriculum standards; rigor and demonstrated mastery strategies.
- **FTF Literacy Curricula** are engaging and rigorous literacy curricula for all eighth-, ninth- and tenth-grade students to dramatically advance their literacy skills toward college-ready levels. These supplemental literacy curricula increase reading and writing skills of students working below grade level and provide enrichment for students working at or above grade level; they complement existing Michigan English/Language Arts courses for these grade levels.
- IRRE works with math teachers, coaches and instructional supervisors to create a **math culture change** by restating the current math curriculum as specific, sequential accomplishments – “I can…” statements. These benchmarks then drive differentiated instruction, student accountability and recognition, and collective commitment to all students becoming college-ready in math. IRRE supports this approach for science as well.
- Teachers and instructional leaders learn to better use regular **common and formative assessments** in math and language arts to drive instructional practice and ensure students are rigorously assessed using high, clear, and fair standards for what they should know and be able to do.
- **Curriculum mapping** is foundational for benchmarking work in math/science and is paired with common assessments in social studies to ensure rigor in all courses and alignment with state standards.
• **Training on effective use of common planning time** includes protocols on lesson planning, student work, data-driven dialogue and peer coaching to drive collaborative conversation.

• **Health Matters and Art Matters** introductory curricula for health- and arts-related academies/pathways – designed to explore intellectual and career aspects of these two themes using rigorous multi-dimensional curricula and instructional strategies emphasizing higher order thinking, concept application and hands-on learning.

• **FTF Senior Internship curriculum** includes identifying work experiences for students (theme based or general areas of interest) paired with a weekly seminar to help students gain from their experiences.

**Effective use of data.** A growing body of research on school improvement places data-driven dialogue and decision-making at the heart of any successful reform effort. IRRE’s approach includes:

• IRRE works with districts to upgrade, if needed, their data management and reporting technology infrastructure and to consult on existing reports or help develop new reports tailored to the needs of each group who will use them. IRRE’s reports cover student performance (including a set of early warning indicators available upon request), behavior, and teaching and learning in the classroom.

• Trainings on effective **data-driven dialogue** for all levels of district and building staff including coaching/training on data access, action planning and monitoring, using data as a key leadership tool, and helping school/district leaders put structures in place to provide the time and space for data-driven dialogue to happen.

• **System leadership support** helps leaders establish the expectations, conditions, and accountability that promote the appropriate use of data; use data-driven dialogue to identify areas of need, develop coherent and systemic strategies for addressing these needs, and put in place the accountability necessary to monitor the effectiveness of these strategies.

• IRRE works with district staff at all levels of the system to establish or strengthen, as needed, the policies, procedures, and accountability to ensure accurate and timely data.

**Advocating for students and families.** Research shows that a strong sense of connection and bonding with others in the school community plays a key role in creating safe schools, enhancing students’ emotional, social and moral growth and promoting academic achievement. Schools implementing IRRE’s approach to family and student advocacy receive intensive support to:

• Create **customized structures** for advocates, students and families to meet and do their work.

• Equip advocates - through training, ongoing coaching, support materials and access to student data - to carry out their responsibilities for working more effectively with students/families.

• Teach advocates to use professional learning communities to build their repertoire of skills, monitor their own and other advocates’ work, and use data more effectively.

• Link school- and community-based services and supports to needs of students and families identified by advocates or brought to an advocate’s or counselor’s attention.

**Personalized small learning communities.** IRRE supports the implementation of smaller learning environments in schools by:

• Providing direct guidance to schools on the complex mechanics of setting up, or repairing existing, personalized small learning communities including staffing, student enrollment, and scheduling.

• Supporting school and district leaders navigate the politics and finances of changing how time, space and people are allocated.

• If appropriate, helping identify appropriate “themes” for communities that incorporate – but also advance – existing successful programs; facilitating staff meetings to create community identities and recruit students; and developing thematic course sequences (if appropriate).

**Building Capacity of Leaders to Sustain Reforms**
As mentioned above, IRRE provides specific meetings, retreats, and teleconferences for leaders to build
their capacity to deepen and sustain reform. One example is our leadership training sequence on data dialogue around effective instruction. This training series builds instructional leaders’ capacity to systematically collect and use data on classroom practices with IRRE’s EAR (Engagement, Alignment, and Rigor) Classroom Visit Protocol. District and building leaders participate in a four session training sequence focusing on attaining a common language and vision for instruction, learning to recognize the indicators of high quality teaching and learning, gaining familiarity with the EAR protocol and the handheld PDA devices that are used to capture data about classroom practices, and accessing and using EAR data. Participants use the protocol during classroom visits conducted alongside IRRE trainers. IRRE staff facilitate conversations about what was seen, help to surface underlying assumptions about teaching and learning, and create consensus about what the leadership team agrees good instruction looks like. A distinct goal of the EAR trainings is learning a structured process of data-driven dialogue so that faculty, leadership, and technical assistance providers can use EAR data to rigorously examine the state of classroom practices, target professional development and supports to struggling teachers, and inform building-wide and academy/small learning community improvement efforts. Data from this tool is used to decide what professional development sessions are of greatest priority – for instance, many schools IRRE works with determine they need more engaging classroom instruction to encourage higher levels of attendance as well as more rigorous instruction to ensure all students are being held to the same high standards.

Using Data from Observations, Assessments, and Reporting Tools to Improve Teaching and Learning and Other Student Outcomes Related to the Building Improvement Plan

IRRE works with each building to ensure that strategies implemented and associated supports are tailored to respond to the identified concerns in the school’s improvement plan. As discussed above, IRRE supports the collection and use of data through the EAR classroom visit protocol to inform improvements in teaching and learning. We also work with teachers and administrators to develop formative assessments to inform individual student and class-wide instructional needs. For example, in math and literacy, teachers participate in a process in which they collaboratively identify the skills, concepts and processes to be mastered as well as build the formative assessments that will allow them to monitor what students have mastered and where they still may need greater support. Multiple assessments are created for each learning target (aligned with all relevant standards) with the knowledge that many students may need additional instructional time and support before reaching mastery while others are ready to advance more quickly. Through this process, teachers gain a greater depth of knowledge about the content as well as learn about how to use the information gathered from these formative assessments to inform their instruction. This system of formative assessment provides students with prompt, frequent, specific and descriptive feedback and opportunities to own, monitor and adjust their own learning. Teachers use this ongoing and frequent data to revise/refine their lesson plans as well as conduct team meetings to analyze the data and determine areas of need or support for their own practice, which might include peer to peer support.

IRRE also works with schools to use this instructional data alongside data on other student academic and behavioral indicators. Specifically, our research team works with district and school staff responsible for student record data to strengthen or create individual “student academic and behavioral profiles” for use by teachers, administrators, parents and students. Often data on course taking, attendance, test scores and disciplinary referrals are collected, stored and reported separately in district systems. Along with our technology partner, Mizuni Inc., we have developed a highly flexible process for integrating these data into a single reporting system with user friendly “dashboards” and a selection of easy to use high priority and early warning reports about each student and at aggregated levels (e.g., by student, grade, course, content area, academy) for use in planning individual and systemic interventions and assessing their effectiveness. Whether a school uses our technology solution or takes advantage of their own reporting system, we also provide training and follow-up coaching to use these student outcome reports to train staff to respond more quickly and effectively to individual student needs and ensure that the school’s improvement plan is being well implemented.
**Exemplar 2: Use of Scientific Educational Research**
*(15 points possible)*

Describe how scientific educational research and evidence based practices will be used as the basis for all content and delivery systems and services provided to the LEA.

- The applicant should provide detailed data that supports successful performance in utilizing research and evidence-based practices in the delivery of systems and services, especially as applied to secondary school settings.
- Cite and reference available research studies (as appropriate) and **provide data** that indicate the practices used have a positive impact on the academic achievement of students in the subjects and grade levels in which you intend to provide services.
Exemplar 2 Narrative Limit: 3 pages (insert narrative here)

IRRE’s core reform strategies that comprise First Things First (see Exemplar 1) draw on theory and research from youth development, education, sociology and organizational psychology; these strategies are refined regularly based on emerging findings from these fields and results from IRRE’s work with our partner schools and districts. Thirty-four high schools and eight middle schools serving high proportions of economically disadvantaged and minority students, in 14 urban, rural and ex-urban districts across seven states including Michigan are now implementing one or more of these core reform strategies. Key research studies linked to each of the core strategies are:

**Using Data Effectively.** A growing body of research on school improvement places data-driven dialogue and decision-making at the heart of any successful reform effort (Allensworth, & Easton, 2005, 2007; Balfanz, & Herzog, 2005; Cavelti, 2001; Heppen & Bowles Therriault, 2008; Snipes, Doolittle & Herlihy, 2002; Togneri & Anderson, 2003). To improve student outcomes, everyone involved needs good data to guide decisions and actions. Teachers need good data to make informed choices about how they teach and what supports are priorities for their students. Students and their families must be able to track progress toward graduation and college-readiness. School and district administrators need good data to select improvement strategies and then to evaluate and refine them. And policy makers at the district, community and state level need good data to allocate limited resources most effectively. IRRE’s approach to using data effectively ensures that each of these stakeholders have access to timely, accurate, and actionable data.

**Strengthening Instruction and Professional Development.** As discussed in Exemplar 1, IRRE’s approach to instructional improvement infuses three instructional goals – Engagement, Alignment, and Rigor – into all of IRRE’s trainings, coaching supports, curricula and instructional tools and processes. In every classroom, every day, we want to see all students (1) actively involved cognitively, emotionally, and behaviorally in their academic work (NCREL, 2005; Tomlinson, 2001; Tomlinson & Allan, 2000); (2) doing work that reflects district and state standards and being provided with opportunities to master the methods used on their state’s high-stakes assessments (Bhola, Impara, & Buchendahl, 2003); and (3) being held to the same high standards and supported by their teachers to do so (Burris, Wiley, Welner, & Murphy, 2008; Quint, Thompson, and Bald, 2008).

A strong consensus exists in the research community that collaborative professional learning communities are “arguably the best, most agreed upon means to continuously improve instruction and student performance” (Schmoker, 2006). IRRE’s professional development, coaching and technical assistance supports such communities through (a) sufficient and regularly scheduled time for planning and collaboration (Guskey, 2003; Lachat, 2001; Oxley, 2005; Wallach & Gallucci, 2004) so that learning is ongoing and embedded in everyday practice (DuFour, 2003; Garet, Porter, Desimone, Birman, & Yoon, 2001; NSDC, 2001); (b) professional learning guided by and aligned with shared instructional goals and standards (Desimone, Porter, Yoon, & Birman, 2002; Wallach & Gallucci, 2004); (c) strong system leadership support to plan, implement, and sustain the focus on shared instructional goals (AISR, 2004; National Staff Development Council 2001; Wallach & Gallucci, 2004); and timely data on student performance and teachers’ instructional practice (Lachat, 2001; National Staff Development Council 2001; NASSP, 2004; Wallach & Lear, 2003).

**Personalized Small Learning Communities.** By bringing the same students (and their families) and teachers together over longer periods of time across the high school years, and students and teachers during each school year, these strategies seek to create a structural platform that reduces the anonymity and impersonality so often cited as contributing to lack of shared norms and values and mutual accountability and trust so critical to effective learning environments (Lee and Smith, 2001). Significant
research finds that smaller learning environments (including personalized small learning communities) are associated with improvements on a wide range of important student outcomes and found improvements in achievement, graduation rates, dropout rates, attendance rates, and behavioral and discipline problems (Cotton, 2001; Darling-Hammond, Ancess, & Ort, 2002; Wasley, Fine, Gladden, Holland, King, Mosak and Powell, 2000).

**Advocating for Students and Families.** Research suggests that the most critical form of parental involvement in improving student academic performance and commitment is getting them more engaged with their own child’s education in collaboration with knowledgeable and caring adults at school (Bouffard & Weiss, 2008; Epstein, 2005; Henderson & Mapp, 2002). In addition, teachers find that when they form strong relationships with their students, they are better able to support them and to demand more from them academically (Ancess 2003; Bryk and Schneider 2002; Lee, Smith, Perry, & Smylie, 1999). And, “a strong sense of connection and bonding with others in the school community plays a key role in creating safe schools, enhancing students’ emotional, social and moral growth and promoting academic achievement” (Educational Research Service, 2002). Finally, young people who have at least one strong, positive relationship with an adult are more likely to succeed in many areas, including academics (Gambone, Klem, & Connell, 2002). IRRE’s Family and Student Advocacy System works with schools to build the structures necessary to facilitate closer, more supportive and longstanding relationships between students and their families and adults in schools.

**Capacity Building.** A growing body of research is beginning to identify an explicit focus on capacity building in successful school and district improvement efforts (Bryk, Sebring, Allensworth, Luppescu, and Easton, 2010; Lane, 2009; Sharratt and Fullan, 2009; Supovitz, 2008). A recent and extensive study of school reform in Chicago found that, “Districts are unlikely to succeed in advancing student learning absent a sustained, integrated, and coherent focus on building their capacity to support school level improvement” (Bryk, Sebring, Allensworth, Luppescu, and Easton, 2010).

In addition to these strategies being research-based, they are also evidence-based. First Things First has demonstrated evidence of effectiveness at improving achievement in reading and mathematics, attendance, and graduation rates. MDRC, a nationally recognized research and policy organization, used an interrupted time-series design to examine school-level impacts of FTF on state assessments of reading and math achievement, attendance, graduation rate, and dropout rate over two-, three- or four-year periods (2001-2004) (Quint, Bloom, Black, Stephens & Akey, 2005). Five urban and rural LEAs and 24 of their middle and high schools serving high proportions of economically disadvantaged and minority students were involved: Kansas City, KS; Houston, TX; Shaw, MS; Greenville, MS, and Riverview Gardens, MO. Change in student outcomes were compared from baseline to follow-ups one to four years later. Comparison schools came from the same state as the FTF sites (where FTF intervention was district-wide) and, in Houston, from the same district. FTF and comparison schools were matched as closely as possible on pre-intervention test scores and other variables such as school size, racial/ethnic make-up, and free or reduced-cost lunches. Analyses controlled for several student characteristics that varied by state.

Overall, MDRC researchers found that FTF was efficacious at the middle and high school level across the four high schools and eight middle schools in Kansas City, KS serving approximately 9,600 predominantly economically disadvantaged, minority students. MDRC also found the high school in Houston, TX with the greatest implementation fidelity showed significant impacts on ELA achievement after one (p ≤.01) and two years (p ≤.10) of full implementation. Sites with lower implementation fidelity did not have statistically significant results. MDRC acknowledged that several positive outcomes were achieved in these other sites; but absence of pre-implementation baselines and low statistical power severely constrained opportunities to detect significant effects. In summarizing the Kansas City, KS results, MDRC noted: “for (the four) high schools, FTF produced [significant], sustained ‘double-digit’
improvements in reading achievement both in terms of increasing the percentage of students whose scores were proficient and reducing the percentage whose scores were unsatisfactory. FTF also improved achievement in math, although by a smaller margin and with less consistency, and significantly improved dropout and graduation rates. For the (eight) middle schools, FTF produced large improvements in reading scores, math scores, and attendance rates. Findings for individual schools show that these impacts were pervasive and statistically significant across schools in the district (p. 74).

Youth Development Strategies, Inc. (YDSI) also evaluated FTF impacts on these same outcomes over a six-year period (1997 – 2003) in the same Kansas City, KS schools (Gambone, Klem, Summers, Akey, and Sipe, 2004). The study had more pre-treatment data on attendance, graduation and dropout than the MDRC study but one year less follow-up data. Using a different quasi-experimental methodology, its results mirrored the MDRC study’s findings showing statistically significant outcomes of FTF on all key indicators at middle and high school levels. Importantly, the YDSI study also found positive effects on closing ethnic achievement gaps for Caucasian versus African American and Hispanic students, outcomes not examined in the MDRC study. FTF schools closed these achievement gaps significantly faster than the rest of the state’s secondary schools in language arts and math (averaged effect, p < .05).

A meta-analysis conducted by the Comprehensive School Reform Quality Center (CSRQ) in 2006 examined both of these studies and reported a large effect size (ES) for FTF on language arts and math achievement. For example, an ES of +1.00 in the CSRQ calculation indicates that students in FTF schools scored one full SD higher than comparison students not using that model. CSRQ reports that the overall effect size for middle and high school student achievement outcomes for FTF schools across the two studies was +1.18. Other independent reviews of these evaluations include the Institute for Education Sciences, which based on this evidence awarded an efficacy grant to study FTF’s instructional improvement strategies (Deci, Aber, Eccles, Rumberger, & Ryan, 2009); the Center for Benefit-Cost Studies of Education (Levin, Belfield, Muennig, & Rouse, 2006), which named FTF as the most cost-effective of five diverse evidence-based interventions shown to improve high school graduation rates based on this same evidence; the American Youth Policy Forum (Hooker & Brand, 2009); Center on Innovation and Improvement (Lane, 2009); Teachers College, Columbia University (Fruchter, 2007); and The Rural School and Community Trust (2004) all affirmed the overall positive findings of the MDRC and YDSI evaluations.

Lane (2009) reports that in the years since initial implementation of FTF and IRRE’s intensive involvement in the Kansas City Kansas Public Schools positive trends in achievement and graduation rates have continued; and college attendance and completion rates have increased at levels well above the national average, particularly for minority students (Wright, Hager, and Hamilton, 2006). Moreover, since the reporting of the MDRC and YDSI findings, First Things First core strategies have been successfully implemented in 15 additional secondary schools serving 24,500 students. A new Harvard University report cites one of First Things First’s partner schools in Texas as showing compelling evidence of closing achievement gaps by half between it schools’ 90+ percent minority student population and state averages in language arts and mathematics (Ferguson, Hackman, Hanna, & Ballantine, 2010); and in four other Texas districts, the number of students scoring proficient or higher on test scores in English/Language Arts increased 11% and mathematics increased 16% in the first two years of implementation. In Arizona, a district implementing just two core strategies saw a gain of three percentage points in English/Language Arts and eight percentage points in mathematics across its four high schools in just one year.
Exemplar 3: Job Embedded Professional Development
(15 points possible)

Describe how a job-embedded professional development plan will be put in place to support principals, school leadership teams, teachers, and support staff.

- The applicant should provide detailed data that supports successful performance in developing job-embedded professional development plans for:
  - principals
  - school leadership teams
  - teachers
  - support staff
Exemplar 3 Narrative Limit: 2 pages (insert narrative here).

IRRE works closely with its district and school partners to create multiple venues for job-embedded professional development. Assuming the partnership begins early enough to allow for a summer training, the following timeline represents an example of a school implementing instructional and advocacy reform strategies and associated leadership supports over three years. The specific activities offered, their timeline, and the length of the partnership will depend upon each school’s needs and calendar.

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Activity</th>
<th>Support</th>
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<tbody>
<tr>
<td>Within the first 3-months of project start</td>
<td>2-day site visit for needs assessment. Ongoing conference calls with leaders to identify reform strategies to be implemented. Ongoing constituency building meetings around strategies selected with key constituents</td>
<td><strong>Who:</strong> Building and district leaders involved in school improvement; constituency groups from teaching staff, students, families, community partners, union and support staff. <strong>When:</strong> 2 days, as soon as possible following selection of IRRE as provider and additional time as needed throughout the years for staff and others to engage with the reform strategies. <strong>Description:</strong> Using IRRE protocols, staff conduct a needs assessment to learn about and assess current status of student outcomes, effective practices, improvement supports, building improvement plan, and building and district reform capacity. IRRE meets with key constituents to exchange information and formulate shared commitments to school improvement strategies selected.</td>
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<td>2 4-day leadership trainings on data-driven dialogue and effective instruction and 90-minute orientation of the process to all staff</td>
<td><strong>Who:</strong> District level school supervisor(s), District IT staff, building leadership team, SLC coordinators (if appropriate), lead teachers. <strong>When:</strong> First semester of Year 1. A refresher training is provided in Years 2 &amp; 3. <strong>Description:</strong> Leadership teams are trained to use the EAR classroom visit protocol to collect reliable data on the quality of teaching and learning. Provides leadership with common language and vision of good instruction to support action planning for PD needs. Training includes customized reports to the schools and District managers. A faculty/staff orientation is scheduled to help focus everyone on a common language and lens for looking at effective instruction.</td>
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<td></td>
<td>3-day Summer Instructional Institute to ensure curriculum consistency across teachers (and schools)</td>
<td><strong>Who:</strong> All teachers and administrators from each participating school. <strong>When:</strong> 3 days, summer prior to Year 1 if possible; 2-3 days each summer after. <strong>Description:</strong> (1 &amp; 2) Math benchmarking for all math teachers and science benchmarking for all science teachers, both based on the district’s curricula; collaborative process of deconstructing the state, district and course level standards into individual learning targets, create common assessments, and design learning activities to support student learning of those targets. (3) FTF Literacy focused on reading and writing skills through thematic content for 9th and 10th grade students to complement the district’s English curricula; recursively use instructional strategies, lesson planning and design formats that can be transferred to any core course. (4) Social Studies curriculum mapping, pacing and development of common assessments; (5) Engagement, alignment and rigor training for all elective teachers. Instructional foci determined by school improvement plan and student needs. <strong>Note:</strong> If this training must occur during the school year, it is 1-day and covers fewer PD topics (e.g., engagement and rigor strategies or differentiating instruction; curriculum-specific PD would start during the first available summer).</td>
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<td>1-day training on effective use of common planning time and advocacy</td>
<td><strong>Who:</strong> All teachers and administration from each participating school. <strong>When:</strong> 1 day in the first quarter (OR summer(s) prior to Years 2/3). <strong>Description:</strong> Training participants learn to use common planning time to improve instructional effectiveness by mirroring and practicing discussions with their professional learning community or academy/small learning community (if appropriate). Begin cross-curricular or project-based planning and differentiation of lesson plans. Deepen understanding of the IRRE’s Family and Student Advocacy System, modeling data-driven discussions to be held about students, and planning activities.</td>
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<td><strong>Timeline</strong></td>
<td><strong>Activity</strong></td>
<td><strong>Support</strong></td>
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<td><strong>Over the course of the school year(s)</strong></td>
<td><strong>Site Visits</strong>&lt;br&gt;4 3- or 4-day instructional and advocacy visits per year (one per quarter)</td>
<td><strong>Who:</strong> Faculty and leadership teams of participating schools  &lt;br&gt;<strong>When:</strong> Years 1, 2 and 3 – approximately one site visit per quarter each year  &lt;br&gt;<strong>Description:</strong> Supports for the instructional work: during Year 1, visits will be focused on embedded PD (for EAR (Engagement, Alignment, and Rigor), content area supports, e.g., benchmarking and literacy. Teachers refine their use of instructional strategies, participate in study groups and receive real time coaching to assist with the transfer of new learning into practice. During Years 2 and 3 the focus continues on EAR, individual instructional coaching and modeling, embedded PD for instructional and data discussions for leader and teacher meetings. Supports for advocacy: focus on providing supports for all students and families, with particular emphasis on freshmen persistence, ensuring all seniors graduate, and college and career readiness. Use of common planning time (if applicable) to Use of IRRE’s advocacy protocol to collect data on effect use of advocacy period (if applicable).</td>
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<td><strong>Leadership Capacity Building Supports</strong>&lt;br&gt;2 1-day data guided PD trainings on instructional improvement</td>
<td><strong>Who:</strong> Faculty and leadership teams of all participating schools.  &lt;br&gt;<strong>When:</strong> 1 per semester in Year 1. Across years 2 and 3, 2 1-day trainings  &lt;br&gt;<strong>Description:</strong> Topics will be based on instructional needs and coaching includes how to provide PD within the school to support more data driven discussions.</td>
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<td><strong>Leadership Capacity Building Supports</strong>&lt;br&gt;2 1-day trainings on effective instructional coaching</td>
<td><strong>Who:</strong> Instructional coaches  &lt;br&gt;<strong>When:</strong> One per semester and one during the summer prior to each year.  &lt;br&gt;<strong>Description:</strong> To work with instructional leaders on modeling, coaching techniques, handling difficult situations, and working individually and in small groups with teachers.</td>
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<td><strong>Leadership Capacity Building Supports</strong>&lt;br&gt;4 1-day trainings on data-driven dialogue</td>
<td><strong>Who:</strong> School/district leadership teams, departments, small learning communities (if applicable), teachers, support staff  &lt;br&gt;<strong>When:</strong> One per quarter  &lt;br&gt;<strong>Description:</strong> Use data-driven dialogue to analyze data, set targets, create next steps and timelines, and review outcomes to improve practice. Support staff, including technology, research and other individuals who make data meaningful and accessible to decision makers are included as key partners in training process.</td>
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<td><strong>Ongoing supports</strong></td>
<td><strong>Bi-Monthly support calls</strong>&lt;br&gt;4 1-day trainings on data-driven dialogue</td>
<td><strong>Who:</strong> Instructional leadership of participating schools  &lt;br&gt;<strong>When:</strong> A two hour call twice/month during Years 1, 2, and 3.  &lt;br&gt;<strong>Description:</strong> Calls will be held to assess the work accomplished during the previous time period. Follow-up from site visits, review of data, challenges encountered, and supports for new teachers will be discussed during these calls.</td>
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<td><strong>Scheduling Supports</strong>&lt;br&gt;4 1-day trainings on data-driven dialogue</td>
<td><strong>Who:</strong> School schedulers (and counseling staff)  &lt;br&gt;<strong>When:</strong> Spring and summer of Years 1, 2 and 3 (on an as needed basis).  &lt;br&gt;<strong>Description:</strong> IRRE’s expert schedulers help develop the master schedule to maximize continuity of care, common planning time, blocked courses (support for 9th grade/career academies and four year small learning communities).</td>
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Exemplar 4: Experience with State and Federal Requirements
(15 points possible)

Describe your experience with State and Federal Requirements, especially as it relates to the following:

- Aligning model(s) to be implemented with the School Improvement Framework
- The Michigan Comprehensive Needs Assessment
- Individual School/District Improvement Plans, North Central Association (NCA)
  - Response demonstrates alignment of the above mentioned elements, AKA “One Common Voice - One Plan.”
- Understanding of Title 1 ( differences between Targeted Assistance and School-wide)
- State assessments — Michigan Educational Assessment Program (MEAP) and the Michigan Merit Exam (MME)
- Michigan Grade Level Content Expectations (GLCEs)
- Michigan High School Content Expectations (HSCEs)
- Michigan Merit Curriculum
- Michigan Curriculum Framework
- Section 504 of the Individuals with Disabilities Education Act (IDEA)
Exemplar 4 Narrative Limit: 2 pages (insert narrative here)

Over the past 14 years, IRRE’s work with struggling schools— all of which met the definition of SIG Tier I, II, or III schools at the start of our partnership— across 11 states including Michigan. All of these partnerships involve helping schools and districts meet or exceed requirements associated with: NCLB, state improvement strategies and other categorical funding programs. In the text below, we provide examples of how IRRE’s support of its five core reform strategies have and will align with state and federal requirements cited in this RFP.

Federal SIG Transformation Requirements. Components of First Things First (see Exemplar 1 for more detail) reform strategies align with every requirement of the Federal SIG Transformation Model. For instance, the SIG model requires schools “promote the continuous use of student data (such as from formative, interim, and summative assessments) to inform and differentiate instruction in order to meet the academic needs of individual students.” As part of the Effective Use of Data reform strategy, in addition to collecting data on teaching and learning in the classroom, educators will be provided with a focused set of reports capturing data on important indicators of student progress. These data are paired with district developed common assessments and common assessments collaboratively developed by IRRE and teachers of content areas to inform data-driven conversations about student needs, and to identify and design necessary supports. Ongoing formative assessment practices are part of the embedded instructional professional development. The SIG model requires schools “provide ongoing mechanisms for family and community engagement.” IRRE’s Family and Student Advocacy provides opportunities for educators to engage students and their families in regular conversations about how best to support student success. IRRE works with school leadership to strengthen existing partnerships with businesses and the local community to provide students opportunities for learning and for making meaningful connections to their communities as future leaders, e.g., student internships. As part of IRRE’s capacity building strategies, the community will be welcomed into the schools to discuss the reform and opportunities to participate. The SIG model requires schools “provide staff ongoing, high-quality, job-embedded professional development that is aligned with the school’s comprehensive instructional program.” IRRE’s job-embedded professional development plan is driven by student outcome data and data on teaching and learning in the classroom and is aligned with the overall instructional goals of engagement, alignment, and rigor.

Title I and Special Education. Because most of the schools IRRE has worked with have been Title I schools, we have to understand whether a school is (a) a school-wide Title I program which allows ARRA funds to be used for any activity that supports the school needs identified through a comprehensive needs assessment and included in a school-wide plan or (b) a targeted assistance program which must use its Title I, Part A funds only to provide supplemental educational services to eligible (i.e., have the greatest need) students selected for those services. Also, because our all of our research-based strategies for helping teachers strengthen instruction focus on meeting the needs of all students; we work with our partner schools to support differentiation of instruction so that the same rigorous lesson is made available to students with some variation as needed (e.g., some students need extra supports and time to attain mastery of the skills while others need more challenging lesson extensions). In this way, we help schools implement Section 504 of the Individuals with Disabilities Act (IDEA) by not discriminating against students with disabilities and ensuring they receive the same high quality education offered to students not qualified as disabled. In particular, we work with schools to implement the least restrictive environment requirement of the law under which students are entitled to be placed in the setting that will meet their individual needs while removing them as little as possible from the regular classroom.

Michigan Assessment Requirements. IRRE’s core reform strategies meet the research- and evidence-based requirements (see Exemplars 1 and 2 for details) and align closely with these requirements. Raising student achievement to levels that ensure students will be successful in higher education and/or high-quality job opportunities summarizes IRRE’s own mission statement and aligns tightly with the newly adopted Common Core Standards (rigorous K-12 curriculum standards that provide teachers with an instructional blueprint) and the Michigan Merit Curriculum (rigorous graduation requirements starting with this year’s 2010-11 graduating class).
In IRRE’s last two years of work with Lincoln High School in Van Dyke Public Schools (Warren MI), we have guided curriculum mapping, lesson planning and the development of common assessments using the Michigan assessment program and the standards for which students are held accountable. To help teachers identify the concepts and skills students must have opportunities to learn in all core areas, IRRE worked alongside Lincoln HS teachers to analyze the Common Core Standards, High School Content Expectations, the Michigan Educational Assessment Program (MEAP) for 9th grade based on Michigan Curriculum Framework, and the Michigan Merit Examination (MME) assessing students in grade 11 and eligible students in grade 12 based on Michigan high school standards. In addition, the MME requires that students know and be able to demonstrate proficiency on the ACT Plus Writing® college entrance examination and the WorkKeys® job skills assessments in reading, mathematics, and "locating information." These MME requirements align closely with IRRE’s FTF Literacy curriculum for 9th and 10th graders: the ninth grade curriculum focuses on expository text and content area reading strategies while the 10th grade curriculum focuses on developing students writing skills for multiple purposes and audiences. Both literacy curricula are written using the College and Career Ready English Language Arts Standards that align very closely with the Michigan Common Core Standards, Michigan High School Content Expectations, and the WorkKeys job skills assessments.

Michigan Department of Education (MDE) School Improvement Framework for Continuous Improvement. IRRE’s initial and ongoing assessments of “readiness and capacity” draw on work by Consortium on Chicago School Research, IRRE and other recognized sources and help schools and districts prioritize reform strategies to be implemented and resources to be reallocated for successful implementation. Over the project period, IRRE works with schools to collect data on the quality of teaching and learning and uses this data in conjunction with student outcome data to inform professional development opportunities. This data-driven continuous cycle aligns directly with Michigan’s “One Common Voice, One Plan,” which asks schools/districts to Gather, Analyze, Plan, and Do. As with IRRE’s improvement process, Michigan’s process begins by gathering data using the Comprehensive Needs Assessment which systematically collects data on school strengths and challenges then uses that data to prioritize goals, develop a school improvement plan, and reallocate resources as needed.

The strands of MDE’s School Improvement Framework align closely with IRRE’s five core strategies. Strand 1: Teaching for Learning aligns with IRRE’s Strengthening Instruction strategy (see Exemplar 1 for more detail). Strand 2: Leadership aligns with IRRE’s Building System Capacity strategy by providing training and tools to strengthen instructional leadership skills; support development of common beliefs, values, and language about what effective practice looks like which creates a platform for greater collaboration and professional growth. This strand also aligns with IRRE’s Personalized Small Learning Communities which provides a structure for distributed leadership. Strand 3: Personnel and Professional Learning aligns with IRRE’s Strengthening Instruction through ongoing, embedded professional development to build teacher’s instructional repertoire and with IRRE’s Personalized Small Learning Communities strategy in which staffing/scheduling experts provide recommendations for strengthening personnel qualifications. Strand 4: School and Community Relations aligns with IRRE’s Family and Student Advocacy program which creates a bridge between families and school and creates a venue for connecting with the community. Strand 5: Data and Information Management aligns directly with IRRE’s Effective Use of Data (see Exemplar 1 for more detail). All of this work can be calibrated using the 26 benchmarks that further define the 12 standards within each strand of Michigan’s framework. The overlap between IRRE’s reform strategies and Michigan’s School Improvement Process ensures that these reforms will meet the expectations of MDE, North Central Association accreditation requirements, and Title I requirements.
Exemplar 5: Sustainability Plan  
(15 points possible)

Describe how a sustainability plan will be put in place for the building to become self-sufficient at the end of the 3-year grant period.

- The applicant should demonstrate significant knowledge and experience in developing sustainability plans.
As discussed in Exemplar 1, IRRE will work from the outset with LEA staff to develop sustainability plans for the reform strategies being implemented. These sustainability plans will focus on three key elements: (1) building the will to continue the reform work; (2) building the capacity of existing and emerging leaders in the schools and districts to deliver needed supports for strengthening and sustaining the successful reform strategies; and (3) identifying the financial resources to ensure the people, processes and tools critical to continued improvement continue to be available to the schools.

The will to continue reforms will be driven first and foremost by all constituencies seeing positive results and a clear way forward to continue and strengthen those successes. IRRE works with its partner LEAs and schools to make changes in practice that will yield early wins that fuel political will and bring hesitant and reluctant participants on board. These early wins have occurred in IRRE’s partner schools that implement core reform strategies quickly and with fidelity. Early wins have been seen in student outcomes (such as improvements in student behavior as they, their families and school-based advocates develop stronger mutually accountable relationships) and in improved classroom practice as teachers, administrators and students focus on clear instructional goals of engagement, alignment and rigor.

As described under Exemplars 1 and 3, leadership at all levels of the system will be engaged intensively in capacity building activities with IRRE staff and with each other to ensure the human capital requirements of sustainability are met. These capacity building activities begin from the outset of our work together (i.e., during the first three months) – through leadership trainings on collecting and using data on classroom practice to inform action planning and professional development. Ongoing meetings – approximately one each quarter and as needed throughout all three years of the project – focus on building the capacity of leaders to support, monitor and hold their staff accountable for engaging in specific practices that are part of the reform strategies. These meetings and trainings are coupled with IRRE staff regularly observing and shadowing these administrators in their roles and conducting real-time coaching, co-conferencing and demonstrations as they engage teachers, students and families in their work. Meetings with leadership teams also include assessments of school policy and operational issues affecting the improvement process.

IRRE will also work closely with district and community leadership to establish new “conditions for success” at the district and community levels to buttress successful reform strategies’ chances for initial and long-term success. These conditions for success include:

- adopting and regularly accessing common, important and simple outcome and implementation metrics to assess progress;
- establishing a “strong partnership” between IRRE and a small number of district staff on a management team who report directly to the superintendent and are solely responsible for personnel, programming and budgeting of the participating schools;
- having a single, unified school improvement plan be dispositive for all the work in the participating schools – a plan that is endorsed fully by all federal, state and district entities, its implementation and funding overseen by the management team;
- having mutual accountabilities for school, district and IRRE personnel with performance management metrics and consequences fully articulated.

IRRE begins working with school(s) and districts from the outset on putting these conditions into place; some of these conditions may even be discussed as part of our contract negotiations. We anticipate that these conditions will be in place prior to year 2.

With these conditions in place, IRRE, and its district partner can begin assessing and responding to the highest priority needs of each school within the district. In this way, participating schools implementing
the First Things First core reform strategies, the management team, and IRRE act as a professional learning community working within a shared reform framework to accomplish common student outcome goals and sustain the district’s and schools’ efforts toward those goals.

Finally, with the capacity building activities proposed, the primary financial challenge to sustaining school improvement strategies is addressed – with salaried staff building their capacity to carry through with the processes, tools and training previously provided by IRRE. Other incremental costs associated with the reform effort – staffing changes, new positions, additional professional development time – will have to be analyzed carefully over the course of the funding period and either new or reallocated sources of funding for essential incremental costs be found. IRRE brings experienced district administrators with track records of sustaining successful reform strategies along with national experts on resource reallocation to its supports for Michigan LEAs and schools. For example, and as documented in Lane (2009), Kansas City, Kansas Public Schools has continued the reform years after IRRE’s significant involvement despite cutbacks in funding and changes superintendents and board membership.
Exemplar 6: Staff Qualifications
(15 points possible)

Provide names and a brief summary of qualifications for the primary staff who will be involved in providing services to LEA’s. Provide criteria for selection of additional staff that are projected to be working with LEA’s. Include vitae of primary staff.

- Staff qualifications and vitae should match with areas that the applicant wishes to serve. Staff should have extensive experience in implementation of all applicable areas.
The following senior IRRE managers are key personnel overseeing all First Things First implementation:

**James P. Connell, Ph.D.**, President and Cofounder of IRRE, has worked to develop and strengthen the First Things First (FTF) framework for more than fifteen years. He was project director in Kansas City, KS, managing all FTF implementation district-wide (30 schools); co-project director in an OERI-funded research/implementation project involving five districts and 24 schools; and directed four Gates Foundation-funded multi-site implementation projects. Long recognized for his research on youth development in urban settings and the theory of change approach to planning and evaluating system change, Dr. Connell has become one of the nation’s foremost experts on education reform. He advises policy-makers, foundations and educators on reform issues and has published numerous books and articles on the planning, implementation, and evaluation of school and district transformation.

**Laurie Levin**, IRRE Director of Family Advocacy and Comprehensive Initiatives, has directed all First Things First (FTF) fieldwork for IRRE since 1999, offering IRRE’s partner schools and districts more than a decade of experience supporting implementation in diverse contexts ranging from small rural schools to large urban districts. She works directly with educators at every level of the school system to clarify the conditions necessary for reform, identify solutions to challenges and roadblocks, and ensure that the necessary leadership skills and capacity are in place to sustain successful reform. Ms. Levin has an extensive background in guiding and supporting complex, multi-site youth development initiatives including a scale-up project involving over 100 sites in 13 states.

**Julie Broom**, IRRE Director of Instructional Supports, has developed and supported national implementation of IRRE’s instructional improvement strategies since 2003 including those provided in an IES-funded randomized control trial effectiveness study of First Things First instructional strategies. She works with all IRRE teams to design and deliver instructional improvement trainings, coaching and wrap around supports. An educator by trade, Ms. Broom has taught every grade level from kindergarten through 12th grade, has several certifications including Special Education, and has served in numerous administrative roles. She began her work with IRRE as the School Improvement Facilitator for a large middle school in the Houston Independent School District (HISD); then served as site director for the seven high schools and middle schools implementing First Things First in HISD.

**William Moore, Ph.D.**, IRRE Director of Research and Measurement Services, has an extensive background in research, evaluation and systems development. He guides the ongoing development and implementation of IRRE’s approach to using data effectively to drive and support the implementation of First Things First’s core strategies. Dr. Moore previously served as Director of Educational Research & Assessment for a large urban district and Senior Research Associate for a major foundation focusing on education and youth development. He has conducted and published evaluations on a wide range of educational initiatives and currently serves as Project Director for IRRE’s Doing What Matters – an initiative to build district capacity and skills to use data more effectively.

**Adena Klem, Ph.D.**, IRRE Director of School Structure and Organization, guides all of IRRE’s work in supporting schools to create personalized learning communities and brings more than a decade of experience developing and providing technical assistance for all of the First Things First core strategies. With a strong background in research/evaluation, Dr. Klem brings both a deep understanding of the education research-base and the concrete conditions in schools that provide supportive and engaging learning environments for students. She has conducted research in large, urban school districts, presented at conferences, and published on topics including student engagement and urban school reform.

Each of IRRE’s directors manages a team of between five and 15 consultants and IRRE staff with deep expertise and long experience within their core strategy areas. All of these consultants have worked in schools and districts facing similar challenges to those in Michigan’s SIG program and have provided direct supports to these schools in ways that have produced meaningful change in practice and in student outcomes. When and if new staff are brought on to the work in Michigan, they will be identified and vetted in the same manner as our current consultants and staff (i.e., through their exemplary practice and training skills within their core strategy area); and IRRE will submit names and resumes to the district for approval and background checks will be conducted, as required.
PERSONNEL VITAE

JAMES PATRICK CONNELL

EDUCATION

1981  Ph. D., Developmental Psychology
      University of Denver

1975  B.A., Psychology
      Kean College of New Jersey

1968-1970  Yale University

PROFESSIONAL POSITIONS

1991-Present  President, Institute for Research and Reform in Education
1992-1995  Senior Vice President and Senior Fellow, Public/Private Ventures
1987-1992  Associate Professor of Education and Psychology, University of Rochester
           Chair of Educatie Processes Area, Graduate School of Education and Human
1981-1987  Assistant Professor of Education and Psychology, University of Rochester

CURRENT RESEARCH AND POLICY INTERESTS

Urban Schools and Communities as Contexts for Child and Adolescent Development
Evaluation Methods

RESEARCH AWARDS

1988  Distinguished Scientific Award of the American Psychological Association for Early
      Career Contribution to Psychology in the Developmental Area
1988  Robert L. Fanz Memorial Award of the American Psychological Association
1988-1993  Faculty Scholar Award from the W.T. Grant Foundation
1982-1983  Young Scholar Award in Social and Affective Development from the Foundation for Child
            Development

PUBLICATIONS

Urban Schools and Communities as Contexts for Youth Development
perspective to the early prediction of African-American males' attachment to the labor force.


families and individual processes as the influence child and adolescent development. In J. Brooks-Gunn,


Connell, James, P.; Klem, Adena J.; Legters, Nettie; West, Thomas, C. (2006). Getting Ready Willing and Able: Critical Steps Toward Successful Implementation of Small Learning Communities in Large High Schools. The work reported herein was supported under a Task Order to provide "Regionally-Based Technical Assistance to Smaller Learning Communities (SLC) Grantees," administered by the Office of Vocational and Adult Education, U.S. Department of Education.
Connell, James, P.; Eccles, Jacquelyn; Kemple, James, J.; Legters, Nettie (2006). Making the Move: How Freshman Academies and Thematic Small Learning Communities Can Support Successful Transitions. The work reported herein was supported under a Task Order to provide "Regionally-Based Technical Assistance to Smaller Learning Communities (SLC) Grantees," administered by the Office of Vocational and Adult Education, U.S. Department of Education.

Connell, James P., Klem, Adena M., Broom, Julie M., Kenney, Mark, with contributions by McLaughlin, Milbrey. (2006). Going Small and Getting Smarter: Small Learning Communities as Platforms for Effective Professional Development. The work reported herein was supported under a Task Order to provide "Regionally-Based Technical Assistance to Smaller Learning Communities (SLC) Grantees," administered by the Office of Vocational and Adult Education, U.S. Department of Education.

**Evaluation Approaches and Methods**


OTHER PUBLICATIONS

Motivation, Education and Youth Development


**Research Methods**


**Early Socio-emotional Development**


EDITORIAL RESPONSIBILITIES


EDITORIAL BOARD

Reviewer Journals:
Child Development
Journal of Personality and Social Psychology
Developmental Psychology
International Journal of Behavioral Development
Journal of Personality
American Education Research Journal
Society for Research in Child Development Monographs
Merrill Palmer Quarterly
Journal of Abnormal Psychology
Multivariate Behavioral Research
Journal of Educational Psychology
PROFESSIONAL MEETINGS
Society for Research in Child Development
American Educational Research Association
International Conference on Infant Studies
American Psychological Association
Society for Research on Adolescence

FEDERAL FUNDING AGENCIES
OERI, US Department of Education
Institute for Educational Sciences, US Department of Education
National Institutes of Mental Health
National Institutes of Child Health and Human Development

PROFESSIONAL ASSOCIATIONS
Society for Research in Child Development
American Psychological Association
Society for Research on Adolescence

COLLABORATIVE PROFESSIONAL ACTIVITIES
Social Science Research Council Working Group on the Urban Underclass
Carnegie Foundation Working Group on Life-skills Training
National Academy of Sciences Planning Board for Indicators of Quality in Mathematics and Science Education
Roundtable on Comprehensive Community Initiatives: Evaluation Steering Committee (Co-chair)

RECENT FOUNDATION AND PUBLIC AGENCY CONSULTANCIES
Annie E. Casey Foundation
Carnegie Foundation
Department of Health and Human Services
Ford Foundation
Foundation for Child Development
Foundation Consortium
Grantmakers for Children Youth and Families
Kauffman Foundation
MacArthur Foundation
National Science Foundation
Rockefeller Foundation
W. T. Grant Foundation
Institute for Research and Reform in Education 1999 – Present

**Director of Academic Advocacy Supports and Comprehensive Reform Services.** Supervise 30 staff and consultants as they provide technical assistance and training to schools and districts implementing First Things First, a comprehensive reform framework. Work directly with superintendents, boards of education and constituency groups to introduce the reform and sustain progress.Troubleshoot challenges, ranging from classroom issues to district-level support. Participate in research and continuous improvement of the reform. Work with national and local foundations, state governments and the U.S. Department of Education on policy. Manage all operations and administration for IRRE.


Provided training, technical assistance, training conferences and evaluation services to local, state and national organizations around programs for adults and youth. Advised and assisted agencies concerned with education, employment, housing, youth development and other human services in community-based programs and change initiatives.

Designed an adult education and vocational training system for a Philadelphia area community-based organization. Design included concept, parameters, standards, staffing, curriculum development/acquisition, support services, administration and evaluation.

Evaluated multiple welfare-to-work and service learning projects across the country. Evaluations were conducted for organizations as diverse as the United Way national service technical assistance project and Campus Boulevard Corporation, a community-based organization.

Held primary responsibility for replication of three programs, forming a four-year sequence, in over 175 communities in 22 states, including:

- **STEP**, a 15-month program providing academics, life skills preparation, work experience and year-round services to disadvantaged young people;
- **Summer PECE**, work/learning based on a youth corps/service model; and
- **Summer Internship**, a program providing young adults the opportunity to learn by taking on jobs with training in private and public sector organizations.
Public/Private Ventures, Philadelphia, PA 1984 - 1992

**Director, Field Services.** Directed the Summer Training and Education Program (STEP). Co-designed and operated the replication process, had primary responsibility for field operations, and raised over $5.5 million from private and public sources.

**Assistant Director.** Managed two Ventures in Community Improvement (VICI) national demonstrations/replications, programs that trained welfare-dependent women and disadvantaged youth in the construction trades while they rehabilitated housing in low income communities. Responsibilities included negotiating financial and cooperative agreements between public and private sector organizations.

**Broward Employment and Training Administration (BETA) 1978 – 1984**

Held progressively responsible positions, culminating in systems development director. Managed programs serving thousands of trainees, supervised staff supervision, developed policy and analyzed and implemented federal and state administrative and program regulations.

**EDUCATION**

1976 – 1978 University of Florida
Master of Arts

1973 – 1976 University of Florida
Bachelor of Arts
JULIE M. BROOM
677 Alpine Dr.
Sautee Nacoochee, GA 30571
832-567-0262

Education:

1994  Houston Baptist University – Houston, Texas
Masters in Education and Behavioral Science
Certified Reading Specialist

1981  University of Northern Colorado – Greeley, Colorado
BS Degree in Therapeutic Recreation and Physical Therapy
Minor in Special Education

Employment History:

7/2003 – Present  Institute for Research and Reform in Education – Houston, TX
Director of Instructional Supports

1996 – 2002  Rice University – Houston, TX
Summers  Conducted summer institutes for the School of Education on reading in the
content areas

Dean of Instruction, School Improvement Facilitator at Sharpstown Middle
School

Director of 7 First Things First secondary Schools

School Improvement Facilitator, Sharpstown Middle School

West District, Secondary Instructional Supervisor and Reading Teacher Trainer.
Directly responsible for training and supervising all Language Arts teachers in
the district’s middle and high schools

1996 – 1997  Houston Independent School District – Houston, TX
Sharpstown High School Special Education Department Chair

1994 – 1996  Sts. Peter and Paul Catholic School (Grades PK-8) – Denver, CO
Interim Principal, Middle School Language Arts Teacher

1990 – 1994  Houston Independent School District – Houston, TX
Westbury High School – Reading Teacher, Dept. Chair
1987 – 1990  **Texas Special Olympics** – Houston, TX  
Greater Houston Director, Regional Director for South, Southwest, and Southeast Texas. Responsible for providing and managing program services at local, area, and state level in accordance with policies, procedures, and rules of Texas Special Olympics.

Middle School Resource English, Math and Science teacher, Solado Middle School

1981 – 1984  **The Institute of Rehabilitation and Research** – Houston, TX  
Therapeutic Recreation Specialist

**Volunteer Experience:**

1981 – 2001  **Texas Special Olympics**  
Served as the Aquatics Director for the area and state swim meets

1982 – 1994  **Family Life Services**  
Served as a presenting team for retreats and seminars on marriage preparation.

1994 – Present  **Odyssey of the Mind**  
Coordinator of the program at my children’s schools and coached a team each year

**Professional Organizations:**  
National Reading Association  
Texas Reading Association  
ASCD  
Center for Applied Curriculum  
Kappa Delta Phi Honor Society
WILLIAM P. MOORE, PH. D.
wmirre@aol.com

10360 South Hollis Lane 913.254.7177 (office)
Olathe, Kansas 66061 913.963.1345 (cell)

EDUCATION

Post-Doc Fellow 2002  Juniper Gardens Children’s Research Center
                   Kansas City, KS
Ph. D.  1991       Educational Psychology
           University of Kansas, Lawrence, KS
M.A.   1984        Curriculum and Instruction
                   University of Kansas, Lawrence, KS
B.S.   1981        Secondary Education
                   University of Kansas, Lawrence, KS

POSITIONS

2006-Present    Director, Research and Measurement Services
                Project Director, Measuring What Matters
                Institute for Research and Reform in Education
                Tom’s River, NJ
2004-2006       Project Director, Measuring What Matters
                Institute for Research and Reform in Education
                Tom’s River, NJ
2003-2004       Managing Associate, Education Studies
                Caliber Associates, Inc.
                Fairfax, VA
2001-2003       Co-Founder/Senior Managing Partner
                Youth Policy Research Group, Inc.
                Kansas City, MO
1998-2002       Director, Educational Research and Assessment
                Kansas City, Kansas Public Schools
                Kansas City, KS
1997-1998       Senior Research Associate, Department of Research and Evaluation
                Education and Youth Development
                Ewing Marion Kauffman Foundation
                Kansas City, MO
1996-1997  Director, Educational Research and Improvement  
Kansas City, Missouri School District  
Kansas City, MO

1996-2006  Lecturer in Evaluation, Research Methods  
University of Kansas, School of Education  
Department of Educational Psychology and Research  
Department of Psychology and Research in Education

1995-1996  Assistant Professor, Measurement and Evaluation  
Department of Educational Leadership and Foundations  
Auburn University, Auburn, AL

1992-1995  Director of Research and Assistant Professor  
University of Kansas, School of Allied Health  
Department of Occupational Therapy Education  
Senior Research Coordinator, KU Cancer Center

1989-1992  Program Evaluator  
Department of Research, Evaluation, and Testing  
Kansas City, Missouri School District  
Kansas City, MO

1986-1989  Graduate Research Assistant/Graduate Teaching Assistant  
Department of Educational Psychology and Research  
Center for Educational Testing and Evaluation  
University of Kansas  
Lawrence, KS

1981-1986  Teacher, Parsons Junior High and Turner High School  
Social Sciences

SELECTED EVALUATION REPORTS (from a total of 95)


**SELECTED PUBLICATIONS (from a total of 17)**


**INVITED PRESENTATIONS (from a total of 48)**


Moore, W. P. (2001, Aug.). *Re-casting the role of the arts in k-12 education: How the arts can contribute to the national educational reform dialogue.* Invited panel presentation at the annual National Conference of Young Audiences Organizations. Kansas City, MO.


**SELECTED CONFERENCE PRESENTATIONS (FROM A TOTAL OF 51)**


SELECTED SERVICE AND APPOINTMENTS
Advisory Panel, Annenberg Institute for School Reform, Leading Indicators of Educational Change, 2005
Youth Development Proposal Reviewer, W. T. Grant Foundation, 2002-2005
Advisory Council, Community Health Promotion Project, University of Kansas Medical Center, 2001-2003
National Panel of Writers, Joint Committee on Standards for Educational Evaluation, Subcommittee to develop standards for student evaluation, Western Michigan University, 1998
National Successful Schools Planning Team, 1997-1998
Vice-President of Education, Sunflower House, A Child Abuse Prevention Center, 1998
Board of Directors, Sunflower House, 1997-1998
Member, National Research Development Committee, *American Occupational Therapy Foundation*, 1995-97
Vice-President for Education, Child Abuse Prevention Coalition, 1996.
Faculty Marshall, University of Kansas Commencement Ceremonies, 1995
Univ. of Kansas School of Allied Health, Research Committee, Elected by Faculty, 1994
Board of Directors, Child Abuse Prevention Coalition, 1994
Univ. of Kansas School of Allied Health, *Dean's Research Award*, Fall, 1993
Madeline Hunter *Effective Teaching Cadre*, 1985-1986

**AFFILIATIONS**
American Education Research Association
American Evaluation Association
Adena M. Klem, Ph.D.

OVERVIEW
Expertise in the implementation and evaluation of education reform initiatives with more than a decade of experience working with public schools and districts involved in comprehensive change. Specializing in supporting district and building leadership through the change process; managing longitudinal evaluations of education and youth development initiatives; and proposal writing for federal and state governments and national foundations. Excellent management, organization, interpersonal, and oral and written communication skills.

PROFESSIONAL EXPERIENCE

2005-Present Director, School Structure and Organization
Institute for Research and Reform in Education (IRRE) Philadelphia, PA
Department Director supervising a team of consultants and liaising with the other department heads to ensure quality implementation of IRRE’s comprehensive reform framework (First Things First) in 10 districts – 30 high schools, 10 middle schools, and 30 elementary schools – nationally.

- Member of IRRE senior management team responsible for reviewing and making organizational decisions about staffing, benefits, budgets, involvement in new projects, and oversight of existing projects.
- Works directly with superintendents, district-level staff, administrators, teachers, and other constituency groups to introduce the structures underlying the reform initiative (e.g., creating small, personalized learning communities).
- Guides district and school leadership through decisions about staffing, scheduling, enrollment, and special program needs (e.g., special education, overage for grade and dropout programs, remedial supports, English as a Second Language (ESL), etc).
- Creates budgets and oversees budget to actuals for all department work.
- Works with IRRE’s Director of Evaluation and Measurement Services to implement data-driven decision making in multiple districts.
- Manages and participates in the writing of numerous proposals, grant applications, and RFQ/RFPs for federal and state governments, national and local foundations, and school districts.
- Managed the development of IRRE’s new website.
2000-2005  Research Manager  
Institute for Research and Reform in Education (IRRE)  
New York, NY/Philadelphia, PA  
- Managed several research projects within the areas of school reform including hiring and supervising research assistants and data analysts, designing research studies, planning data analyses, preparing data for presentation, creating evaluation materials, and publishing articles/reports on IRRE’s reform theory, strategies, and outcomes for the comprehensive reform initiative First Things First (FTF).  
- Member of the development team responsible for building a technology based system that collects and generates reports presenting data on student outcomes and reform implementation quality to schools and districts implementing FTF. Specific tasks include tool development and creation of training materials.  
- Presenter and/or discussant at numerous professional meetings including the National Association for Secondary School Principals, the Wingspread Conference on School Climate and Connectedness, and the Society for Research on Adolescence annual meeting.

2001-2008  Consultant  
Youth Development Strategies, Inc. (YDSI)  
Philadelphia, PA  
- Support the president of YDSI in her role as research manager of a large scale evaluation of a district-wide comprehensive school reform initiative over the last three years of data collection, data analyses, and report writing. Specific tasks include working with the district’s research department to collect data, overseeing the work of the data analysts and research assistants, and participating as a member of the research team authoring the final evaluation report.

2001-2002  Consultant  
National Research Council  
Washington, DC  
- Authored a report summarizing research on strategies comprehensive school reform models utilize to engage adolescents in learning.

1998-2001  Consultant  
Gambone & Associates  
Philadelphia, PA  
- Worked with the research management team in the Kansas City, Kansas School District to: design student, teacher, and parent questionnaires; train district staff members to administer the questionnaires throughout the district; plan and manage cross-sectional and longitudinal data analyses for questionnaire and school records data; prepare presentations to District and Foundation representatives.  
- With a team of consultants, developed a comprehensive literature review on adolescent development, reviewed secondary analyses on existing youth development data sets, and published a report summarizing the literature and data analyses.  
- Participated in interviews Youth Development Mobilization (YDM) evaluation and prepared a written analysis of the Albuquerque YDM initiative.
1998-2000  **Research Associate**  
*Institute for Research and Reform in Education (IRRE)*  
New York, NY  
- Provided research for First Things First (FTF) reform initiative technical assistance providers helping schools and districts implementing FTF.  
- Co-authored papers on school reform and theory of change.  
- Conducted and prepared literature reviews, particularly in the areas of youth development, school reform, and comprehensive community initiatives.  
- Developed a toolkit for the theories-of-change approach to planning and evaluating comprehensive community initiatives with a team from IRRE and the Aspen Roundtable.  
- Created a Guide on FTF Implementation Strategies based on interviews conducted with school staff currently implementing FTF.

1995 – 1998  **Consultant**  
*Institute for Research and Reform in Education (IRRE)*  
New York, NY  
- Planned data analyses evaluating longitudinal data from schools participating in the Middle Grades Project and prepared the final report for the Princeton Center for Leadership Training.  
- Developed a needs-assessment strategy for Trenton Central High School’s School-Site Management Team with a team of consultants. Work included survey development; assessment of administrative records; training of school staff to administer the surveys; and write-up of the final report.  
- Managed the research design, questionnaire administration, data analysis, and final report for the WT Grant Laboratory School Project in Elizabeth, New Jersey.

**EDUCATION**

1996  Ph.D., Experimental Social Psychology, Columbia University, New York  
1993  M.A., Experimental Social Psychology, Columbia University, New York  
1991  B.S., Psychology, University of Maryland, College Park, Maryland

**CURRENT RESEARCH AND POLICY INTERESTS**

- Urban Schools and Communities as Contexts for Child and Adolescent Development  
- Evaluation Methods and Research Methodology

**SELECTED PUBLICATIONS**

Connell, J.P.; Klem, A.M.; Legters, N.; and West, T.C. (2006). Getting Ready Willing and Able: Critical Steps Toward Successfull Implementation of Small Learning Communities in Large High Schools. The work reported herein was supported under a Task Order to provide "Regionally-Based Technical Assistance to Smaller Learning Communities (SLC) Grantees," administered by the Office of Vocational and Adult Education, U.S. Department of Education.


PROFESSIONAL ASSOCIATIONS

- American Educational Research Association
- Association for Supervision and Curriculum Development
- Society for Research on Adolescence
REFERENCES


SECTION C: ASSURANCES

The applicant entity:

1. will follow all applicable legislation and guidance governing the Section 1003(g) school improvement grants.

2. will follow all applicable Federal, state, and local health, safety, employment, and civil rights laws at all times.

3. will comply with the MDE Standards for Monitoring Section 1003(g) School Improvement Grants Preferred External Education Services Providers.

4. agrees to make all documents available to the MDE or LEA for inspection/monitoring purposes, and participate in site visits at the request of the MDE, the district, or facilitators/monitors for the SIG grant.

5. agrees to notify MDE and applicable district(s), in writing, of any change in the contact information provided in this application within ten business days.

6. ensures that it will provide written notification to MDE, when external preferred provider services will no longer be provided, thirty days prior to termination of services.

7. assures that they have accurately and completely described services they will provide to the LEA.

8. assures they will comply with SEA and LEA requirements and procedures.
SECTION D: ATTACHMENTS

- **Licensure:** Applicants must attach a copy of their business license or formal documentation of legal status with respect to conducting business in Michigan (e.g., certificate of incorporation, proof of 501(c)(3) tax-exempt status). Schools, school districts, and ISDs/RESAs may substitute documents that include address/contact information and the appropriate building or district code as found in the Educational Entity Master (EEM).

- **Insurance:** Applicants must provide a proof of their liability insurance or a quote from an insurance agency that reflects the intent to obtain general and/or professional liability insurance coverage.
Date: OCT 08 2003

INSTITUTE FOR RESEARCH AND REFORM
IN EDUCATION INC
308 GLENDALE DR
TOMS RIVER, NJ  08753-0000

Dear Applicant:

Our letter dated August 1999, stated you would be exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, and you would be treated as a public charity during an advance ruling period.

Based on our records and on the information you submitted, we are pleased to confirm that you are exempt under section 501(c)(3) of the Code, and you are classified as a public charity under the Code section listed in the heading of this letter.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, (800) 829-3676. Information is also available on our Internet Web Site at www.irs.gov.

If you have general questions about exempt organizations, please call our toll-free number shown in the heading between 8:00 a.m. - 6:30 p.m. Eastern time.

Please keep this letter in your permanent records.

Sincerely yours,

Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Letter 1050 (DO/CG)
### Certificate of Liability Insurance

**Producer:**
Lincoln Brokerage Corp.  
464 Bay Ridge Avenue  
Brooklyn NY 11220-5996  
Phone: 718-836-1100  
Fax: 718-833-1582

**Insured:**
The Institute For Research And Reform In Education, Inc  
25 South Shore Dr  
Toms River NJ 08753

**Coverages:**
The policies of insurance listed below have been issued to the insured named above for the policy period indicated. Notwithstanding any requirement, term or condition of any contract or other document with respect to which this certificate may be issued or may pertain, the insurance afforded by the policies described herein is subject to all the terms, exclusions and conditions of such policies. Aggregate limits shown may have been reduced by paid claims.

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**Automobile Liability**

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**Garage Liability**

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<th>ANY AUTO</th>
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**Excess / Umbrella Liability**

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**Workers Compensation and Employers' Liability**

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**Other**

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**Certificate Holder**

Gina Rehrer  
25 South Shore Dr  
Toms River NJ 08753

**Cancellation**

Should any of the above described policies be cancelled before the expiration date thereof, the issuing insurer will endeavor to mail 10 days written notice to the certificate holder named to the left, but failure to do so shall impose no obligation or liability of any kind upon the insurer, its agents or representatives.

Authorized Representative:
Lincoln Brokerage Corporation

ACORD 25 (2009/01)  
© 1988-2009 ACORD CORPORATION. All rights reserved.
**INSURANCE BINDER**

**THIS BINDER IS A TEMPORARY INSURANCE CONTRACT, SUBJECT TO THE CONDITIONS SHOWN ON THE REVERSE SIDE OF THIS FORM.**

**AGENCY**
Lincoln Brokerage Corp.
464 Bay Ridge Avenue
Brooklyn, NY 11202-5996
Lincoln Brokerage Corporation

**PHONE** (AIG, No. Ext): 718-836-1100
**FAX** (AIG, No. Ext): 718-833-1562

**INSURED**
The Institute for Research & Reform in Education Inc
25 South Shore Dr
Toms River NJ 08753

**COMPANY**
Philadelphia Insurance Company

**BINDER #:** 5064

**DATE EFFECTIVE:** 03/25/10 12:01 AM
**DATE EXPIRATION:** 03/25/11 12:01 AM

**DESCRIPTION OF OPERATIONS/VEHICLES/PROPERTY (Including Location):**
Loc 1: 26 South Shore Dr Toms River NJ
Loc 2: 1500 Walnut St Ste 700A Phila PA

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### COVERAGES

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<tr>
<td>SCHEDULED AUTOS</td>
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<tr>
<td>HIRED AUTOS</td>
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<tr>
<td>NON-OWNED AUTOS</td>
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<tr>
<td>AUTO PHYSICAL DAMAGE</td>
<td></td>
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<tr>
<td>COLLISION</td>
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<tr>
<td>OTHER THAN COLL.</td>
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</tr>
<tr>
<td>GARAGE LIABILITY</td>
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<tr>
<td>ANY AUTO</td>
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<td></td>
</tr>
<tr>
<td>EXCESS LIABILITY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UMBRELLA FORM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTHER THAN UMBRELLA FORM</td>
<td>Retro Date for Claims Made</td>
<td></td>
</tr>
<tr>
<td>WORKER'S COMPENSATION AND EMPLOYER'S LIABILITY</td>
<td>Includes Property Elite Endorsement. Additional Insured's on file with Lincoln Brokerage Corporation</td>
<td></td>
</tr>
</tbody>
</table>

---

**NOTE:** IMPORTANT STATE INFORMATION ON REVERSE SIDE © ACORD CORPORATION 1993-2004
## INSURANCE BINDER

### AGENCY
Lincoln Brokerage Corp.
464 Bay Ridge Avenue
Brooklyn, NY 11220-5996
Lincoln Brokerage Corporation

### PHONE (ASC. No. Ext.)
718-836-1100

### FAX (ASC. No.)
718-833-1582

### CODE:
SUB CODE:

### INSURED
The Institute for Research & Reform in Education Inc
25 South Shore Dr
Toms River NJ 08753

### COMPANY
Philadelphia Insurance Company
Binder # 5065

### DATE EFFECTIVE
03/25/10

### TIME
12:01 AM

### DATE EXPIRATION
03/25/11

### TIME
12:01 PM

### OP ID:
EF

### DATE (MM/DD/YYYY)
03/24/2010

### DESCRIPTION OF OPERATIONS/VEHICLES/PROPERTY (including Location)
Directors & Officers Liability

### COVERAGE

<table>
<thead>
<tr>
<th>TYPE OF INSURANCE</th>
<th>COVERAGE/FORMS</th>
<th>LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROPERTY</td>
<td>CAUSES OF LOSS</td>
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</tr>
<tr>
<td>BASIC</td>
<td>BROAD</td>
<td>SPEC</td>
</tr>
<tr>
<td>GENERAL LIABILITY</td>
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</tr>
<tr>
<td>COMMERCIAL GENERAL LIABILITY</td>
<td>CLAIMS MADE</td>
<td>OCCUR</td>
</tr>
<tr>
<td>DIRECTORS &amp; OFFICERS</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>PL</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>AUTO LIABILITY</td>
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</tr>
<tr>
<td>ANY AUTO</td>
<td>ALL OWNED AUTOS</td>
<td>SCHEDULED AUTOS</td>
</tr>
<tr>
<td>AUTO PHYSICAL DAMAGE</td>
<td>DEDUCTIBLE</td>
<td>ALL VEHICLES</td>
</tr>
<tr>
<td>COLLISION</td>
<td>OTHER THAN COL</td>
<td></td>
</tr>
<tr>
<td>GARAGE LIABILITY</td>
<td>ANY AUTO</td>
<td></td>
</tr>
<tr>
<td>EXCESS LIABILITY</td>
<td>UMBRELLA FORM</td>
<td>RETRO DATE FOR CLAIMS MADE</td>
</tr>
<tr>
<td>OTHER THAN UMBRELLA FORM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WORKER'S COMPENSATION AND EMPLOYER'S LIABILITY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SPECIAL CONDITIONS/OTHER COVERAGES</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### NAME & ADDRESS

<table>
<thead>
<tr>
<th>MORTGAGEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOSS PAYEE</td>
</tr>
<tr>
<td>ADDITIONAL INSURED</td>
</tr>
<tr>
<td>LOAN #</td>
</tr>
</tbody>
</table>

### AUTHORIZED REPRESENTATIVE
Lincoln Brokerage Corporation

---

ACORD 75 (2004/09)

NOTE: IMPORTANT STATE INFORMATION ON REVERSE SIDE © ACORD CORPORATION 1993-2004
NEW BUSINESS
Pay Plan: Direct - 30% Down & 2 35% Installments

1. Named Insured and Address
THE INSTITUTE FOR RESEARCH & R
25 S SHORE DR
TOMS RIVER NJ 08753-2621

Producer
LINCOLN BROKERAGE CORP.
464 BAY RIDGE AVENUE
BROOKLYN NY 11220

NCCI Carrier # 69928
FEIN # 522165670
Risk ID #
Entity of Insured CORPORATION

Telephone: 718-836-1100 0000568

Additional Locations: Other workplaces not shown: See Extension of Information Page

2. The Policy Period is from 03/15/2010 to 03/15/2011 12:01 a.m. Standard Time at the Insured's mailing address.


B. Employers Liability Insurance: Part TWO of the policy applies to work in each state listed in Item 3A. The limits of our liability under Part TWO are:
   - Bodily Injury by Accident $1,000,000 each accident
   - Bodily Injury by Disease $1,000,000 policy limit
   - Bodily Injury by Disease $1,000,000 each employee

C. Other States Insurance: Part THREE of the policy applies to the states, if any, listed here:
   None

D. This policy includes these endorsements and schedules: See attached schedule.

4. The premium for this policy will be determined by our Manuals of Rules, Classifications, Rates, and Rating Plans. All information required below is subject to verification and change by audit.

SEE EXTENSION OF INFORMATION PAGE

Minimum Premium $244

Total Estimated Annual Premium $1,006
Expense Constant $220
Premium Discount $0
Deposit Premium $1,006

Assessments and Taxes See Attached Extension of Information Page

Premium Adjustment Period: ☑ Annual; ☐ Semiannual; ☐ Quarterly; ☐ Monthly

Countersigned this
Issued Date: 03/16/2010
Servicing Office: 120 Broadway, 31st Floor, New York, NY 10271-3199

Authorized Representative

INSURED COPY
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INFORMATION PAGE

WORKERS COMPENSATION AND EMPLOYERS LIABILITY POLICY

INSURER: HARTFORD INSURANCE COMPANY OF THE MIDWEST
HARTFORD PLAZA, HARTFORD, CONNECTICUT 06115

NCCI Company Number: 20605
Company Code: G

POLICY NUMBER:

Previous Policy Number:
13 WEC RF3050
13 WEC RF3050

HOUSING CODE: DW

1. Named Insured and Mailing Address:
INSTITUTE FOR RESEARCH & REFORM IN EDUCATION INC.

(No., Street, Town, State, Zip Code)
25 S SHORE DR
TOMS RIVER, NJ 08753

FEIN Number: 522165670

State Identification Number(s):

The Named Insured is: NOT FOR PROFIT
Business of Named Insured: CONSULTANT - NOC
Other workplaces not shown above: 1420 LOCUST STREET, 7Q
PHILADELPHIA PA 19120

2. Policy Period:
From 11/11/09 To 11/11/10
12:01 a.m., Standard time at the insured's mailing address.

Producer's Name: KEH INSURANCE AGENCY INC/PHS

Producer's Code: 652439

Issuing Office: THE HARTFORD
301 WOODS PARK DRIVE
CLINTON, NY 13323
(866) 467-8730

Total Estimated Annual Premium: $5,562
Deposit Premium: $335 PA
Policy Minimum Premium: $335 PA

Audit Period: ANNUAL
Installment Term:
The policy is not binding unless countersigned by our authorized representative.

Countersigned by
Authorized Representative
10/03/09
Date

Form WC 00 00 01 A (1) Printed in U.S.A.
Process Date: 10/03/09

Page 1 (Continued on next page)
Policy Expiration Date: 11/11/10
3. A. **Workers Compensation Insurance:** Part one of the policy applies to the Workers Compensation Law of the states listed here: PA

B. **Employers Liability Insurance:** Part Two of the policy applies to work in each state listed in Item 3.A. The limits of our liability under Part Two are:

<table>
<thead>
<tr>
<th>Bodily injury by Accident</th>
<th>$500,000</th>
<th>each accident</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bodily injury by Disease</td>
<td>$500,000</td>
<td>policy limit</td>
</tr>
<tr>
<td>Bodily injury by Disease</td>
<td>$500,000</td>
<td>each employee</td>
</tr>
</tbody>
</table>

C. **Other States Insurance:** Part Three of the policy applies to the states, if any, listed here:

ALL STATES EXCEPT ND, OH, WA, WY, AND STATES DESIGNATED IN ITEM 3.A. OF THE INFORMATION PAGE.

D. **This policy includes these endorsements and schedule:**

```plaintext
WC 00 04 21C WC 00 04 22A WC 99 03 19B WC 00 04 19 WC 37 04 05
WC 37 06 01 WC 37 06 02 WC 37 06 03A
```

4. **The premium for this policy will be determined by our Manuals of Rules, Classifications, Rates and Rating Plans.** All information required below is subject to verification and change by audit.

<table>
<thead>
<tr>
<th>Classifications Code Number and Description</th>
<th>Premium Basis Total Estimated Annual Remuneration</th>
<th>Rates Per $100 of Remuneration</th>
<th>Estimated Annual Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>951 SALESPERSONS - OUTSIDE</td>
<td>583,500</td>
<td>.77</td>
<td>4,493</td>
</tr>
<tr>
<td>953 CLERICAL OFFICE EMPLOYEES</td>
<td>127,800</td>
<td>.41</td>
<td>524</td>
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<tr>
<td>INCREASED LIMITS PART TWO (9807) 1.90 PERCENT</td>
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<tr>
<td>TOTAL PREMIUM SUBJECT TO EXPERIENCE MODIFICATION</td>
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<tr>
<td>PA - MERIT RATING CREDIT (9885)</td>
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<tr>
<td>PREMIUM ADJUSTED BY APPLICATION OF EXPERIENCE MODIFICATION</td>
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<tr>
<td>TOTAL ESTIMATED ANNUAL STANDARD PREMIUM</td>
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<td>EXPENSE CONSTANT (0900)</td>
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<td>PA EMPLOYER ASSESSMENT 2.41 PERCENT</td>
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<td>TERRORISM (9740)</td>
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<tr>
<td>CATASTROPHE (9741)</td>
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<td>TOTAL ESTIMATED ANNUAL PREMIUM</td>
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</tbody>
</table>

Total Estimated Annual Premium: $5,562
Deposit Premium:  
Policy Minimum Premium: $335 PA

Interstate/Intrastate Identification Number:

Labor Contractors Policy Number:

Form WC 00 00 01 A (1) Printed in U.S.A.
Process Date: 10/03/09

NAICS: 8748
SIC:  
UIN:  
NO. OF EMP: 000011

Page 2
Policy Expiration Date: 11/11/10