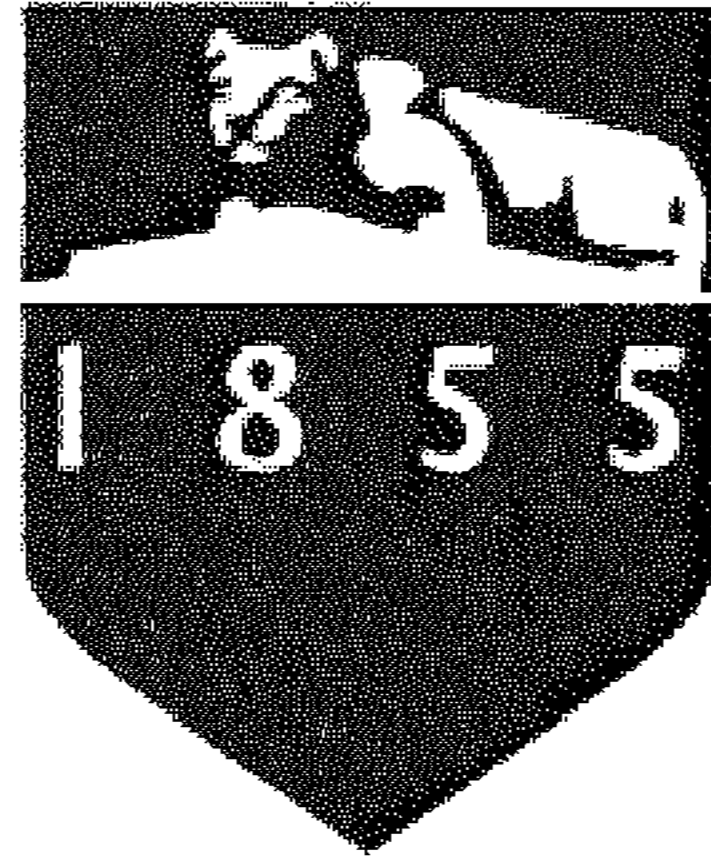


PENNSSTATE



Mid-Atlantic Collaborative for Applied Research in Education (M-CARE)

Technical Proposal

Tasks 1–5

Solicitation #: ED-05-R-0006

October 3, 2005

Rutgers, The State University of New Jersey
Caliber Associates, Inc.
Metiri Group
Synergy Enterprises, Inc.
Association for Supervision and Curriculum Development

Prepared by

**The Pennsylvania State University
Office of Sponsored Programs**

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DUNS# 00-340-3953

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(b)(4)

APPENDIX C: LETTERS OF SUPPORT

I. COVER SHEET



Technical Proposal

M-CARE: The Mid-Atlantic Collaborative for Applied Research in Education Tasks 1 – 5

Research Proposal Submitted in Response to Solicitation: ED-05-R-0006

Submitted: October 3, 2005

Submitted by:

**The Pennsylvania State University
Office of Sponsored Programs
110 Technology Center Building
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In Collaboration with:

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Approved by University Authorized Official:

Robert Killoren

Associate Vice President for Research and Director of Sponsored Programs

If awarded, The Pennsylvania State University would like to negotiate terms & conditions applicable to educational institutions and nonprofit organizations (see attached list of exceptions taken).

This proposal will remain valid for at least 90 days from submission date.

U.S. Department of Education
Solicitation No. ED-05-R-0006
Title: Regional Educational Laboratory Program

The Pennsylvania State University requests negotiation of terms and conditions consistent with clauses applicable to educational and other non-profit institutions.

Section H Special Contract Requirements

1. Please delete paragraph 6(a) in Article H.5. This is not consistent with FAR Clause 52.227-14 Rights in Data (General) with Alternate IV in Section I.
2. Please delete Article H.13 Publication and Audio-Visual Production in its entirety. Preferred Clause 3452.227-70 Publication and Publicity.
3. Please delete Article H.23 FAR Clause 52.232-12 II Advance Payments (May 2001)—Alternate II (May 2001) in its entirety. Not applicable per 32.412(a).

Section I Contract Clauses

Request the following changes:

1. Delete FAR Clause 52.215-19 Notification of Ownership Changes. Per 15.408(k), Penn State is not subject to Subpart 31.2.
2. Add FAR Clause 52.227-11 Patent Rights -- Retention by the Contractor (Short Form) as prescribed in 27.303(a)(1).
3. Delete FAR Clause 52.232-17 Interest as prescribed in 32.617(a)(5).
4. Delete FAR Clause 52.246-5 Inspection of Services – Cost Reimbursement and replace with “FAR Clause 52.246-9 -- Inspection of Research and Development (Short Form)” as prescribed in 46.309.
5. Delete FAR Clause 52.248-1 Value Engineering in its entirety. Not applicable per 48.201.
6. Delete FAR Clause 52.248-1 III Value Engineering (Feb 2000) – Alternate III (Apr 1984) in its entirety. Not applicable per 48.201.
7. Delete FAR Clause 52.249-6 Termination (Cost Reimbursement) and replace with “FAR Clause 52.249-5 -- Termination for Convenience of the Government (Educational and Other Nonprofit Institutions)” as prescribed in 49.502(d).

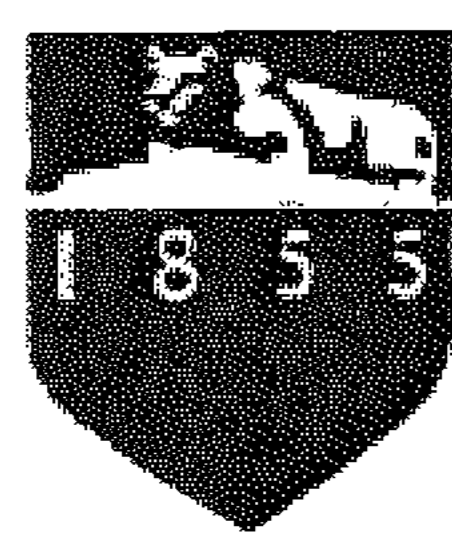
Attachment C – Guidelines for Preparing Vouchers

For Item 10) – Providing detailed labor hours per task on invoice – As an educational institution, The Pennsylvania State University is subject to the requirements of OMB Circular A-21 “Cost Principles for Educational Institutions” and that circular does not require institutions of higher education to capture or report any salary and wage data based upon hours worked. As such, Penn State has not developed any systems to capture or report this data.



Disclosure Statement

This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed – in whole or in part – for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of – or in connection with – the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained herein.



Proposal Transmittal

**Submitted by: The Pennsylvania State University
College of Education**

Solicitation No. ED-05-R-0006

M-CARE: The Mid-Atlantic Collaborative for Applied Research in Education

Tasks 1 - 5

Enclosed:

Technical Proposal: 1 Original + 5 copies
Business Proposal: 1 Original + 5 copies
Past Performance Report: 1 Original + 1 copy

Submitted To:

**Kenneth Bell
U.S. Department of Education
Contracts and Acquisitions Management
550 12th Street, SW, 7th Floor Room 7120
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Program Contact:

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II. EXECUTIVE SUMMARY

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1. INTRODUCTION AND BACKGROUND

(b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4)

2. HIGHLIGHTS OF THE TECHNICAL PLAN

Needs Analysis, Training and Technical Assistance Response

(b)(4)

We are also sensitive to the rural section of our region. Some are surprised by the extent of the rural population in the mid-Atlantic. More than 603,000 students—nearly 15%— in the region attend rural public schools, as do 25% of all students in Pennsylvania. The M-CARE team, through our training and technical assistance work, is well experienced with service to rural schools. Based on the formal needs assessments, plus our work in the region, we have set a needs-based agenda for year one.

The M-CARE team plans to pursue our continuing needs assessment and technical assistance work through an innovative approach that will strengthen dialogue and collaboration between the research and practice communities. This approach is founded on a well-tested model for bridging research to practice, with which the M-CARE team has extensive experience, described in the proposal that follows.

(b)(4)

(b)(4)

¹ A report to the U.S. Department of Education on *Educational Challenges and Technical Assistance Needs for the Mid Atlantic Region (RAC)*, prepared for the mid-Atlantic Regional Advisory Committee, issued March 31, 2005; a series of interviews conducted with Mid Atlantic chief State school officers (or designees) conducted in summer 2005 by staff members of M-CARE's partner organizations.

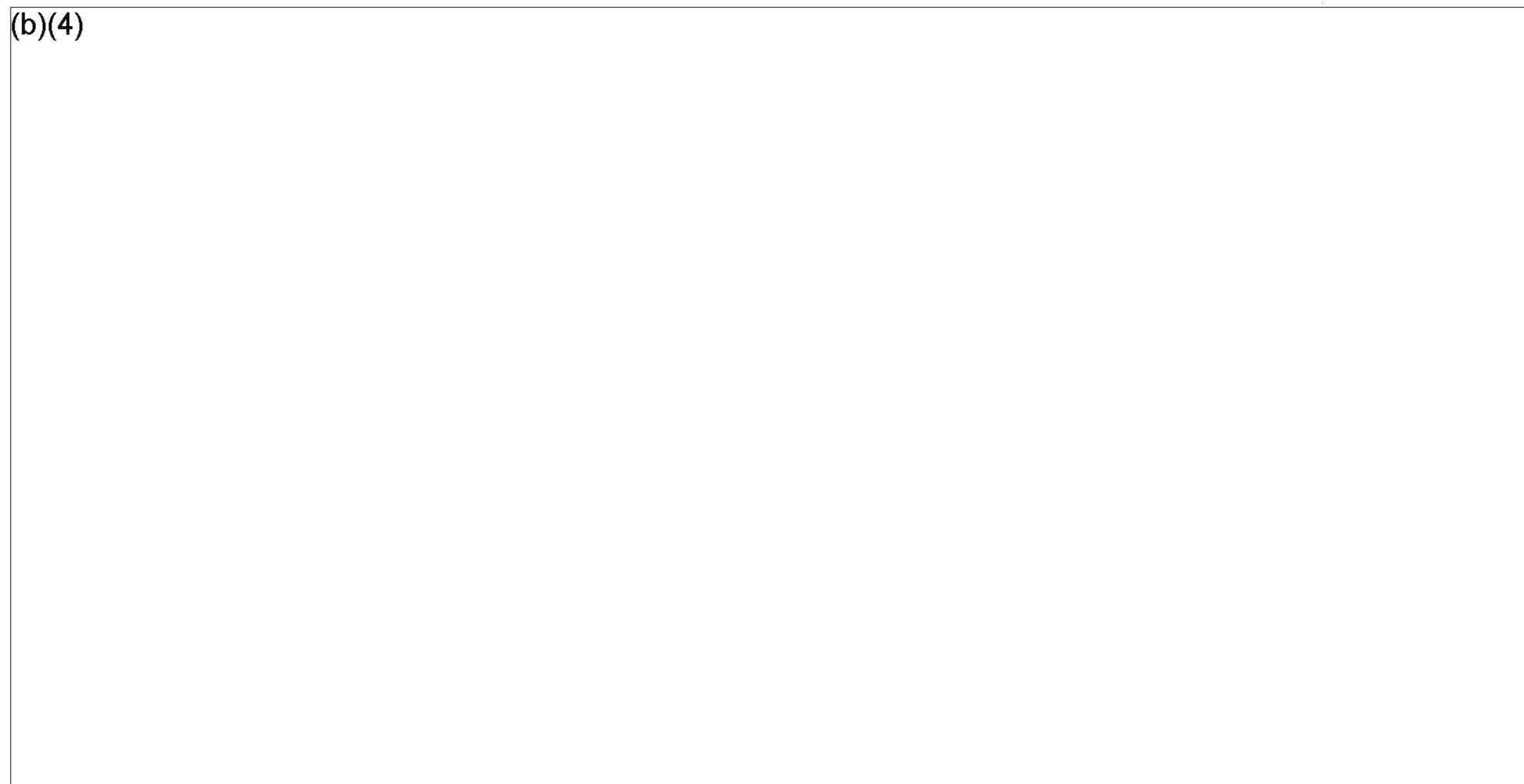
Fast Response Applied Research and Development Projects

(b)(4)

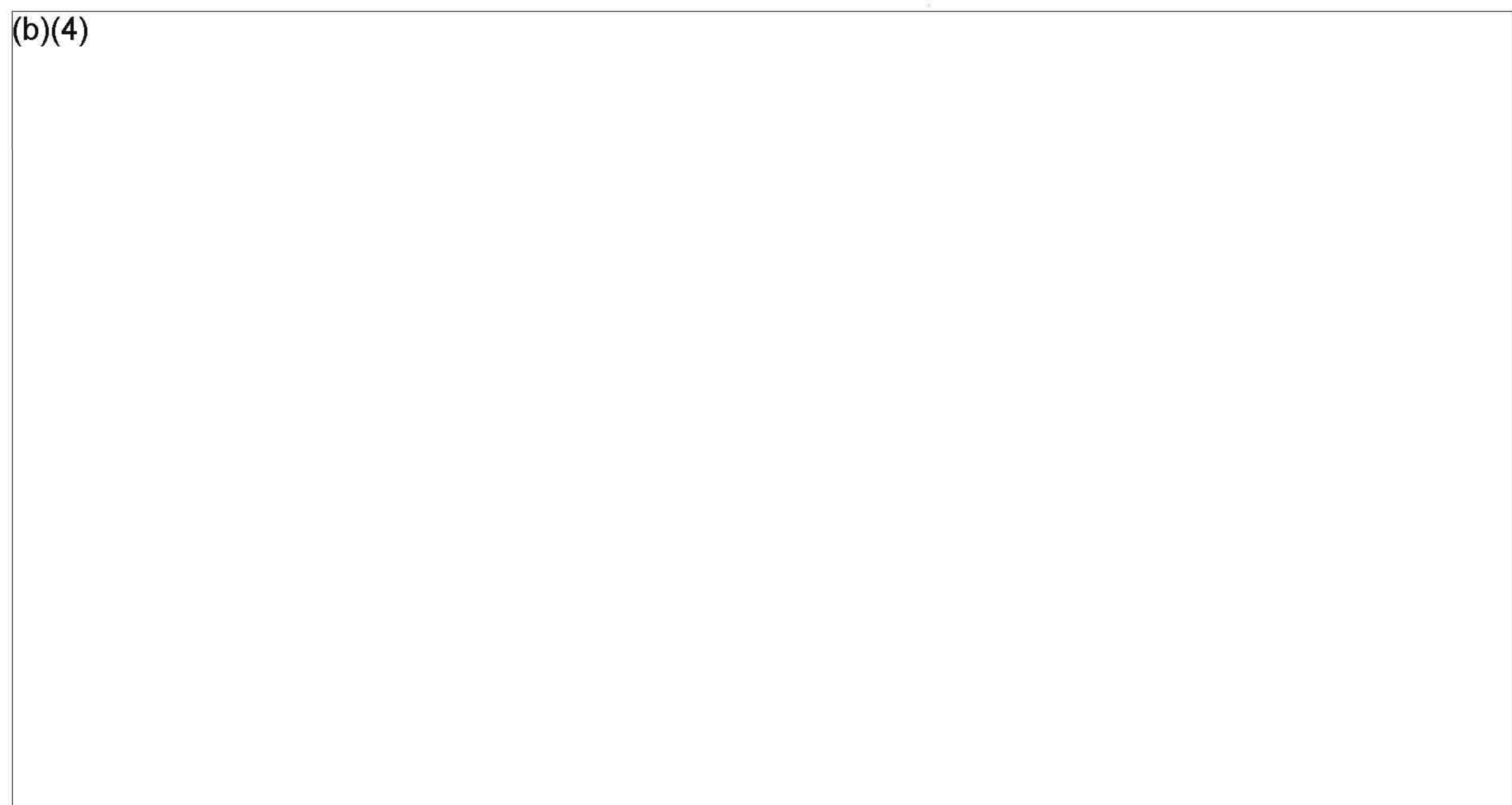
(b)(4)

Rigorous Applied Research and Development Projects

(b)(4)



(b)(4)



(b)(4)



- The effects of the **Web-based Inquiry Science Environment (WISE)** on the achievement in mathematics and science of middle school students

- The effects of **Cognitive Mapping and the Use of Graphic Organizers** on the reading comprehension of seventh graders in content areas

- The effects of **Advancement Via Individual Determination (AVID)** programs on achievement in mathematics, science, and reading, and on high school completion rates
- The effects of the **Cognitive Apprenticeship Approach** to teaching reading on the reading comprehension of middle school students.

3. ORGANIZING, MANAGEMENT AND STAFFING FEATURES

Organizing and Management Features

(b)(4)

Staffing Features

The partner organizations provide breadth and depth in the requisite skills for conducting M-CARE's work successfully. Those skills and experiences include knowledge of State and local education agencies and policies within the region, skills in conducting needs assessment and applied research, and experience in conducting research-based technical assistance and in disseminating information useful to educational practitioners. Both Penn State and Rutgers, outstanding research universities, supply noted researchers to staff the proposed Task 1 and 2 studies: (b)(4)

(b)(4)

(b)(4)

M-CARE's outstanding research, TA and management capability is supplemented by the following individuals who have agreed to serve as members of the external Technical Working Group (TWG) to advise on the conduct of the research: (b)(4)

(b)(4)

The combined expertise of these staff and expert consultants represents the full range of skills in management, research, technical assistance and dissemination to ensure high quality, timely work on all tasks and studies carried out by M-CARE.

III. TECHNICAL PLAN

III. TECHNICAL PLAN

1. THE M-CARE PARTNERSHIP

Pennsylvania State University has joined forces with Rutgers, the State University of New Jersey; Caliber; and the Metiri Group to create M-CARE, the new Regional Education Laboratory for the mid-Atlantic States of Delaware, Maryland, New Jersey, Pennsylvania and the District of Columbia. The partnership is complemented by the Association for Supervision and Curriculum Development, the largest, nonunion education membership organization, to assist in the design of, and provide support to, the vitally important dissemination functions of the Lab. We are joined by Synergy Enterprises, Inc., a major logistical support contractor to the Department of Education. This partnership represents a forceful synergy of the knowledge, experience, networks, and capacity required to meet the research, information, training, and technical assistance needs of school districts, schools, and other education stakeholders in the region.

The M-CARE partnership brings in-depth knowledge of the circumstances that face educators in the mid-Atlantic, based on our many years of experience conducting research here, working in schools, and providing a variety of research-based services to practitioners, State policy-makers, and national organizations working in the region. The discussion of the mid-Atlantic region that follows reflects the first step in the needs assessment that is a core and ongoing function of the M-CARE. We have drawn upon our collective knowledge as well as data and other research to document the needs in the region. We have identified State and regional needs based on the goals and priorities of the States, the status of their schools in meeting the requirements of NCLB, and regional and contextual factors that influence both the level of need and the type of assistance to be provided. We have consulted with high-level officials from each State education agency.

This effort has established a baseline for the development of the technical plan for M-CARE. While we are confident in our knowledge of the region, its people, and education challenges, we are also enthusiastic and open to the new understanding and directions that the comprehensive needs assessment process, discussed under Task 1, will bring to M-CARE's work.

2. EDUCATIONAL CHALLENGES IN THE MID-ATLANTIC: RANKING OF ISSUES BY STATE OFFICIALS

In order to hit the ground running with research that is meaningful to the mid-Atlantic, we conducted interviews this past summer with the chief State school officers (or their designees) for the four States in the region and the District of Columbia. (Letters of support from the chief State school officers or designees are included with this proposal.) Most representatives noted that their State education agency does not have the capacity to provide the assistance their districts need, and they welcomed the idea of a resource network of regional centers and labs. They identified five priority areas for assistance: improving academic achievement of student subgroups, increasing student achievement in content areas, improving high schools, reforming special education, and recruiting, retaining, and training highly qualified teachers.

We also asked each State official to rank the eight challenges identified in the 2005 RAC Report, *Educational Challenges and Technical Assistance Needs for the Mid Atlantic Region*.¹ Their rankings are displayed in Exhibit 1-1.

EXHIBIT III-1.1 RANKING OF MID ATLANTIC REGIONAL ADVISORY COMMITTEE (RAC) CHALLENGES BY MID-ATLANTIC STATES, JUNE 2005					
	Delaware	District of Columbia	Maryland	New Jersey	Pennsylvania
1. Aligning standards, curriculum, instructional, and assessment goals with proven instructional practices that use developmentally appropriate teaching methodologies that address the needs of all subgroups, especially special education and English language learners.	1	2	1	1	1
2. Recruiting, training, and retaining a high quality workforce.	6	1	4	4	7
3. Building a collaborative environment using research-based standards and support at the school and district levels with other education stakeholders (e.g., family, business, community, and other social service agencies).	4	4	6	3	6
4. Assisting or enabling practitioners to evaluate the effectiveness of the learning environment and to implement programs, policies, practices, and safety measures.	3	3	7	5	4
5. Educational decision-making aligning all governing structure, activities, roles, and responsibilities toward the goal of improving student achievement.	5	6	5	6	2
6. Disseminating clear, concise, culturally responsive language and appropriate information about NCLB and its implementation to all educational stakeholder groups.	8	8	2	7	5
7. Educators are facing new types of sanctions and a total lack of incentives under NCLB, with little guidance on how to deal with this new environment.	7	7	8	8	8
8. Developing the capacity to provide appropriate student interventions and support.	2	5	3	2	3

Exhibit III-1.1 is remarkable both for the different emphases it reveals among State officials and for their near unanimity about the first challenge, alignment. Our interviews with State officials further illuminated their views.

2.1 Improving the Academic Achievement of All Students

The NCLB requirement to disaggregate performance data by student subgroups (students living in poverty, students of color, and students with disabilities) has helped State, district, and school officials recognize the existence of achievement gaps in their schools and identify districts that appear to need support to close these gaps. The Pennsylvania official emphasized the need for school improvement in order to meet NCLB requirements. The New Jersey representative noted that districts need assistance to refine and target instruction that would be more effective with students not achieving well; this includes districts labeled successful when the performance of the overall student population was considered, but

¹ A report to the U.S. Department of Education on *Educational Challenges and Technical Assistance Needs for the Mid Atlantic Region (RAC)*, prepared for the Mid Atlantic Regional Advisory Committee, issued March 31, 2005.

whom the disaggregated data show have not made sufficient progress toward increasing the achievement of students in specific subgroups. The Maryland official noted that, within a district where corrective action is needed, all schools may not need help. Several proposed Task 2 studies will investigate the effectiveness of promising interventions with those subgroups whose achievement has been difficult to increase.

2.2 Increasing Student Achievement in Content Areas

Most States identified mathematics and reading as the content areas that are their top priority for increasing student achievement. The Delaware and Maryland officials identified mathematics as the priority for middle and high schools, with Delaware noting a need for professional development for middle school math resource teachers. The Delaware and Maryland officials both identified language arts/literacy as a high-need area, with Maryland seeking strategies to increase the reading and literacy levels of middle and high school students and Delaware hoping that its all-day kindergarten initiative would improve literacy achievement in later grades.

Delaware has identified data that reveal an important pattern in mathematics: Hispanic secondary students tend to perform better on mathematics assessments than African-Americans; however, the dropout rate among Hispanic students is greater. Delaware would like to identify and implement strategies to decrease the dropout rate, especially among Hispanic students. The New Jersey official expressed the need for strategies to increase enrollment and retention of students from minority racial and ethnic groups in advanced placement courses.

Several of the studies we propose investigate promising strategies to improve student achievement in math and reading comprehension. One of our proposed studies investigates "AVID," an approach that appears to have reduced dropout rates and increased college entrance rates and retention in the first years of college among at-risk youth, by preparing them for, and placing them in, a more challenging curriculum.

2.3 Improving High Schools and Reforming Special Education

Reforming the high school curriculum and reforming our approaches to the education of students with special needs were also cited as high priority needs, but we are not proposing any Task Two work in these areas because ED has recently awarded a Regional Content Center that focuses on high schools.

Officials from New Jersey and the District of Columbia, where there is a high percentage of special education students, noted the need for assistance with that issue. Providing technical assistance for teachers at all levels in the use of evidence-based differentiated instruction strategies is a high priority.

In Task 1.2, M-CARE describes a fast response project that concerns family involvement at the high school level. We anticipate conducting other Task One fast response applied research and development projects in response to needs that emerge in special education and high school reform, after consultation with the National Laboratory Network.

2.4 Recruiting, Retaining, and Training Highly Qualified Teachers

Most State officials cited the need for assistance in creating a highly qualified teaching staff, and the Washington, DC representative ranked it as the number one priority. Besides recruitment and retention needs, districts also seek professional development models that emphasize the use of evidence-based strategies to teach standards-based content, as the New Jersey official noted.

Exhibit III-1.2 suggests the variation among and within the States in the region in terms of indicators of teacher quality. The table also illuminates the complexities of the term, since the indicators may appear contradictory and the standards vary by State. For example, although 85 percent of Delaware's classes are taught by high quality teachers, only 55 percent of its high school teachers have a college major in their core subject.

EXHIBIT III-1.2 TEACHER QUALITY INDICATORS				
	State % of Classes Taught by High Quality Teachers	Number of NBC** Teachers (SY2004)	NBC Teachers as a Percentage of All Teachers	% of High School Teachers with College Major in the Relevant Core Subject Area
Delaware	85	250	3	55
DC	75	12	0	81
Maryland	65	498	1	68
New Jersey	NA*	97	0	74
Pennsylvania	95	180	0	72

* NA indicates data were not available for this state.

** National Board Certified.

Sources: Table published in the *Mid-Atlantic RAC Report*, based on data from the Center on Education Policy Year 2 of NCLB Report (2002-2003), NBPTS (2002-2003), Measuring Up: 2004 (Education Week 2005 for NBC data).

Research consistently indicates that no factor is more important in student achievement than the quality of the classroom teacher. This fact combined with its importance in the mid-Atlantic have led the M-CARE team to propose a Fast Response Research and Development Project that will consider best practices in professional development of teachers.

3. EDUCATIONAL CHALLENGES IN THE MID-ATLANTIC: ACHIEVEMENT GAP DATA FROM THE NAEP TESTS

One measure of student achievement that allows for comparability across states and among subgroups of students is the National Assessment of Education (NAEP). Exhibit III-1.3 offers a snapshot of the mid-Atlantic States that contrasts overall student performance. New Jersey students consistently score highest across assessment categories. Pennsylvania students most frequently score in the second rank, with Delaware and Maryland closely ranked in third or fourth place. District of Columbia students consistently rank last on NAEP tests.

But as the No Child Left Behind (NCLB) Act has demonstrated, statewide averages do not tell the whole story. The scores reported by different schools and even districts within each State vary enormously, and so this exhibit obscures the actual performance of students in individual schools and

districts. Nevertheless, the exhibit does indicate the dimensions of the challenge that the region faces in improving student performance to a minimally acceptable level on key indicators.

EXHIBIT III-1.3 MEASURES OF STUDENT ACHIEVEMENT IN THE MID-ATLANTIC REGION					
	Delaware	District of Columbia	Maryland	New Jersey	Pennsylvania
4th Grade Math (2003)					
NAEP Test: percent scoring at or above proficient	31	7	31	39	36
4th Grade Reading (2003)					
NAEP Test: percent scoring at or above proficient	33	10	32	39	33
8th Grade Math (2003)					
NAEP Test: percent scoring at or above proficient	26	6	30	33	30
8th Grade Reading (2003)					
NAEP Test: percent scoring at or above proficient	31	10	31	37	32
High School Graduation (2002)					
Statewide Graduation Rate: percent of high schools seniors who graduated	63	*	77	89	80
Timely College Enrollment (2002)					
Statewide Enrollment Rate: percent of ninth grade students who graduated from high school four years later and enrolled in 2- or 4-year degree-granting institution	26	*	41	53	45

Source: *Quality Counts 2005* An Education Week/Pew Charitable Trusts report on education in the 50 states.

* No data available.

The portrait of student achievement in the mid-Atlantic also begins to look more complex as it is disaggregated across racial and ethnic groupings. High school graduation rates for 2002 range from 63 to 89 percent across the mid-Atlantic States, according to Exhibit III-1.3. Exhibit III-1.4 presents the variation among racial and ethnic groups in 2001 high school completion rates, which includes students who do not graduate from high school but subsequently earn the GED.

EXHIBIT III-1.4 FOUR-YEAR HIGH SCHOOL COMPLETION RATES BY RACE, ETHNICITY, AND STATE 2000-2001						
	Total	American Indian/ Alaskan Native	Asian/Pacific Islander	Hispanic	Black Non-Hispanic	White Non-Hispanic
Delaware	81.6	88.2	91.3	70.2	74.6	84.8
District of Columbia	*	*	*	*	*	*
Maryland	83.2	81.7	93.5	84.3	76.9	86.3
New Jersey	88.0	85.2	94.8	78.4	76.7	92.5
Pennsylvania	84.0	60.8	86.1	42.3	73.3	88.2

Source: National Center for Education Statistics

- No data reported.

The data in Exhibit III-1.4 begin to reveal the achievement gap that NCLB was established to redress.

Startling and substantial achievement gaps emerge when the NAEP Math and Reading scores are disaggregated for subgroups of students in the mid-Atlantic States, as in Exhibits III-1.5 to III-1.6.

EXHIBIT III-1.5										
PERCENT OF STUDENTS ACHIEVING PROFICIENCY ON 2003 NAEP MATH BY STUDENT CHARACTERISTICS, GRADE LEVEL AND STATE IN THE MID-ATLANTIC REGION										
Student Characteristics	Delaware		District of Columbia		Maryland		New Jersey		Pennsylvania	
	Grade 4	Grade 8	Grade 4	Grade 8	Grade 4	Grade 8	Grade 4	Grade 8	Grade 4	Grade 8
Overall	28	21	6	5	26	23	34	27	32	25
Racial/Ethnic Group										
White	39	29	50	--	37	31	44	35	39	29
Black	11	8	4	3	10	8	11	7	8	4
Hispanic	16	10	6	3	20	12	17	12	12	6
Asian/Pacific Islander	49	--	--	--	39	37	47	40	--	--
Free/Reduced-Price School Lunch										
Eligible	15	10	3	2	10	9	15	9	15	10
Not Eligible	37	26	16	19	36	28	42	33	42	31

-- Sample size is not sufficient to permit a reliable estimate.

Source: U.S. Department of Education, Institute of Education Sciences, National Center for Education Sciences, National Assessment of Educational Progress (NAEP), 2003 Mathematics Assessments.

EXHIBIT III-1.6										
PERCENT OF STUDENTS ACHIEVING PROFICIENCY ON 2003 NAEP READING BY STUDENT CHARACTERISTICS, GRADE LEVEL AND STATE IN THE MID-ATLANTIC REGION										
Student Characteristics	Delaware		District of Columbia		Maryland		New Jersey		Pennsylvania	
	Grade 4	Grade 8	Grade 4	Grade 8	Grade 4	Grade 8	Grade 4	Grade 8	Grade 4	Grade 8
Overall	26	29	8	9	23	27	28	33	26	27
Racial/Ethnic Group										
White	34	37	33	--	31	35	35	42	31	34
Black	14	13	6	7	12	12	12	15	8	11
Hispanic	17	13	6	11	20	19	18	16	9	23
Asian/Pacific Islander	36	42	--	--	33	43	30	51	--	--
Free/Reduced-Price School Lunch										
Eligible	16	15	5	6	12	12	13	15	13	14
Not Eligible	32	35	15	14	30	32	34	40	33	36

-- Sample size is not sufficient to permit a reliable estimate.

Source: U. S. Department of Education, Institute of Education Sciences, National Center for Education Sciences, National Assessment of Educational Progress (NAEP), 2003 Reading Assessments.

The requirement to disaggregate performance data by subgroups has revealed achievement gaps that previously were not noticed or addressed. Across the nation, certain demographics are often

associated with poor academic performance—poverty, disability, English language learners, and racial/ethnic minority groups—although this should not be interpreted to mean that students with these characteristics necessarily perform poorly. Further disaggregation of these data may reveal important trends, such as, to take but one example, the substantial variation in academic achievement among different Asian and Hispanic subgroups.

And of course, State averages again mask differences across the State, from community to community, within school districts and within schools, in the rankings of subgroup scores. Some schools and some classroom settings have documented substantial progress toward closing achievement gaps and raising achievement levels overall. A key mandate of M-CARE will be to identify best practices that redress the achievement gap.

4. EDUCATIONAL CHALLENGES IN THE MID-ATLANTIC: RURAL ISSUES

The mid-Atlantic is among the more urbanized regions in the U.S. However the four Mid-Atlantic States have significant rural populations—much of Pennsylvania, western Maryland and the State's eastern shore, southern New Jersey, and sections of Delaware. Only the District of Columbia is entirely urbanized. Exhibit III-1.7 provides essential facts about school populations, structure, and financing in these rural areas.

EXHIBIT III-1.7 RURAL EDUCATION IN THE MID-ATLANTIC REGION				
	Delaware	Maryland	New Jersey	Pennsylvania
Number of students enrolled in rural schools	21,082	128,313	102,034	352,040
Percentage of students enrolled in rural schools	20.5%	15.3%	7.7%	20.1%
Percentage of public schools in rural areas	21.0%	17%	8.0%	25.0%
Percentage of all students attending small rural schools	3.4%	4.1%	1.6%	6.8%
Percentage of state education funding to rural schools	17.3%	9.4%	12.9%	24.4%
Percentage of rural students who qualify for subsidized meals	35.6%	18.9%	13.5%	24.6%
Percentage of rural students who receive special ed services	16.5%	13.9%	16.4%	13.2%
Percentage of rural students who are minorities	30.6%	19.9%	15.1%	4.6%

Source: *Why Rural Matters*. The Rural School and Community Trust, May 2005.

More than 603,000 students attend rural schools in the mid-Atlantic, nearly 15 percent of the more than 4.2 million students attending schools throughout the region. The recent publication from the Rural School and Community Trust, *Why Rural Matters*,² examines rural schooling according to four gauges: its importance in the State, level of poverty, other socioeconomic challenges, and policy outcomes, which include achievement measures, graduation rates, and other structural factors, such as student-teacher ratios and per pupil spending.

The Trust's analysis of rural education in these four states reveals very diverse issues. Delaware, for example, has high rates of special education and minority students among its rural school population, very large schools and districts, and spends a high percentage of its education funding for transportation to

² Jerry Johnson and Marty Strange. (May 2005). *Why Rural Matters*. Rural School and Community Trust.

regional schools. Maryland's rural schools also have very large schools and districts (median organizational scale 17 times the national median), high student-teacher ratios, and notable spending on transportation. Despite the relative affluence of its rural areas, New Jersey also faces challenges: its rural schools rank seventh in the U.S. in proportion of special education students, vary widely in levels of State and local revenues available to schools, and pay more than most States for transportation. Pennsylvania has the 6th largest rural school population in the U.S., with half of its school districts (243 out of 501) considered rural. It fares well on many of the Trust's measures but also faces very high transportation costs, a large organizational scale, and high teacher-student ratios.

EXHIBIT III-1.8

Pennsylvania's Rural School Districts

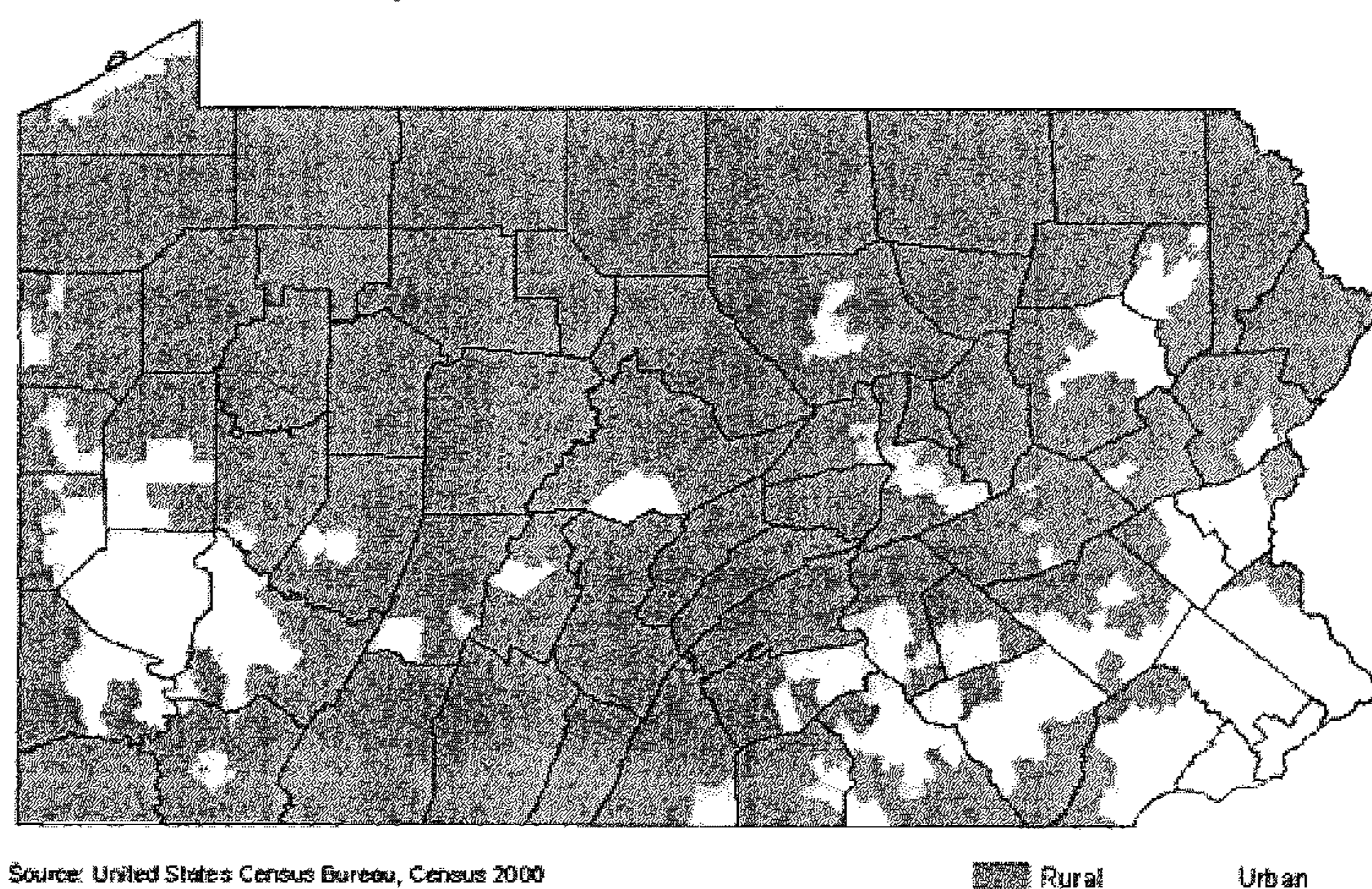


Exhibit III-1.8, a map of Pennsylvania, vividly depicts how much of the Commonwealth remains rural. In these rural areas, 68 percent of the graduating class of 2000 planned to go on to college or trade school, in contrast to the more than 77 percent of graduates in urban areas who planned to do so, according to data from the Pennsylvania Department of Education (PDE).

These briefly noted statistics confirm the lessons of our experience throughout the region. School districts in mid-Atlantic rural communities serve hundreds of thousands of children, many of whom experience an upbringing in poverty or other disadvantages. These circumstances are often accentuated by the isolation and limited resources also typical of rural areas. In every one of its functions, the M-CARE team must stay attuned to the circumstances and needs of rural areas, and ensure that its outreach, needs assessment, and dissemination activities account for these.

Fortunately, the M-CARE team brings experience in the challenges that face rural schools. Pennsylvania, for example, since at least the late 1990s, has sought to use technology to link educators and students to resources, with the PDE Link to Learn and subsequent initiatives. Metiri Associates, part of the M-CARE team, currently operates the Technology Solutions That Work Database for the PDE, which gives educators access to current research on technology-based learning strategies. Penn State University is home to the Center on Rural Education and Communities, which has been engaged in research on student transiency in rural areas and the potential of broadband access to address various rural issues,

among others, and helped convene a 2005 conference of experts to develop an action plan for research on Indian education.

In this section, the M-CARE team has offered an overview of the educational challenges facing the mid-Atlantic region, with particular attention to the achievement gap and to the rural sections of the region. Our collective history working with the region's schools, districts, and State agencies has given us firsthand experience with these challenges and with the daily struggles of policymakers and practitioners to respond constructively. The need is obvious for evidence-based research that will provide educators and other stakeholders with the knowledge they need to respond effectively to these challenges.

Task 1: Regional Education Needs Analysis, Training and Technical Assistance and Fast Response Applied Research and Development Projects

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Deliverables: Report on Needs Analysis and Training and Technical Assistance Response Unit, 10 weeks; Create and Maintain Database, 3 weeks; Revised First Response Plan, 10 weeks (each year); OMB Clearance Package, as needed; Documentation of IRB Approvals, as needed; Revised Plans and Schedules for Annual Fast Response Applied Research and Development Projects, 10 weeks each year; Draft and Final Policy Briefs and/or Production for each Last Response Project; ED Approved Schedule, Month Project Reports

The M-CARE team strongly supports the new core mission of the Regional Education Labs: to conduct applied research and development that meets the needs of educators working to improve student achievement. The team that we have assembled will mobilize its collective experience in identifying evidence-based educational strategies and working with low-performing schools to improve the academic achievement of all students.

The M-CARE plan set forth in Task 1 includes marketing and outreach to education stakeholders throughout the region, identifying the education needs that stakeholders in the mid-Atlantic perceive, and addressing many of them rapidly, through reviews of the existing research base and through dissemination, training, and technical assistance activities that are coordinated with the other Regional Education Labs, the National Laboratory Network, and ED comprehensive centers. We begin by discussing the research-to-practice model that will inform our work.

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Subtask 1.1 – Regional Education Needs Analysis, Training, and Technical Assistance Response Unit

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The Fast Response Plan

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Outreach and Marketing Network

The M-CARE team will use its knowledge, regional networks, and experience to develop and implement a multi-tiered approach for marketing the regional Lab as a resource to the field, which will include: identifying intended audiences, including professional groups as well as underserved populations; identifying marketing channels and intermediaries; developing messages appropriate for each audience; testing and refining messages to ensure that they are clear, relevant, and sensitive to the audience and cultural characteristics; delivering the marketing message; and evaluating the impact and effectiveness of the marketing activities.

To initiate the marketing process, M-CARE staff will work closely with ED, the NLN, and the ED Comprehensive Centers to identify untapped marketing resources, underserved client populations, and the field's current knowledge of regional Lab services. Our marketing efforts will seek to reach educational stakeholders in the region, identifying our services and responsiveness to them. Our marketing messages will also encourage stakeholders to seek assistance from M-CARE and feel confident about the results.

M-CARE's ability to collect information about the Mid-Atlantic's needs related to school improvement is based on its capacity to create an outreach and marketing network that will blanket the region and reach deeply into the diverse populations of education stakeholders that the regional labs are charged with serving. One strategy alone cannot accomplish the mission of reaching broadly and deeply across this constituency. A one-size-fits-all strategy for communications and engagement cannot succeed with populations as diverse as that of the mid-Atlantic, with its great economic, linguistic, and cultural variety.

Another rationale for creating an outreach network is that it engages M-CARE in ongoing communications with education stakeholders, a back-and-forth flow of information and requests that will continually inform and shape our work. From raising awareness about the regional Lab and its services in the initial weeks of the contract, to conducting continual needs assessment, to fielding technical assistance and training and monitoring its impact—M-CARE's functions will rely on the flexibility and breadth of its outreach network.

In addition, although M-CARE exists to serve a client base of education stakeholders, we will in fact be asking something of them as well—to take the time to participate in the needs assessments and to contact M-CARE when they need information. They are unlikely to do so unless these outreach strategies also create enough interest to encourage stakeholders to view M-CARE as a potentially helpful resource. Over time, the outreach network will generate confidence and trust, as education stakeholders find M-CARE's services useful and tell colleagues about their experiences.

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Communication through Membership and Advocacy Organizations

M-CARE's third outreach strategy will be to tap into the existing networks of the many membership and advocacy organizations whose members have an important stake in the educational process in the mid-Atlantic. These may include local as well as State-based, regional, and national organizations. The following list is not exhaustive but suggests the breadth of these entities:

- Parents—National Parent Teacher Association
- Teachers—American Federation of Teachers, National Education Association, Teacher Advancement Program (Milken Family Foundation), American Association of Educators, Association for Supervision and Curriculum Development
- Administrators—National Middle Schools Association, National Association of Secondary School Principals, National Association of Elementary School Principals, Association of Educational Service Agencies, American Association of School Administrators, National Association of State Boards of Education, Association for Supervision and Curriculum Development

- School Boards—National School Boards Association
- States—Council of Chief State School Officers, Education Commission of the States, Southern Regional Education Board, National Association of State Departments of Teacher Education and Certification, National Center for Education Information
- Advocacy—The Education Trust, Council of Great City Schools, National Governors Association, National Urban League, National Council of La Raza, Black Alliance for Educational Options
- Media or Business—National Alliance for Business, *Education Week*, Business Roundtable.

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This tier of marketing is potentially broad-based, designed to be effective in various settings and across many professional and cultural audiences. These tools could include—besides the press releases and news story—a general brochure, a general fact sheet, other news articles, and conference exhibits. All marketing materials will have a professional, engaging, and consistent graphic that identifies them as M-CARE products.

A Systemic Process for Needs Assessment

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The formal needs assessment process will rely primarily upon two strategies: annual surveys of stakeholders and open hearings/ teleconferences.

Continuing Surveys of Mid-Atlantic Education Stakeholders

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Open Hearings/Teleconferences

During the first year of the contract, we propose to hold two open hearings in Washington, D.C. and Philadelphia, with a teleconference option for those too distant to attend the hearing. (Caliber has had great success with this approach, having created open hearing/teleconference options for its ED client, the Office of Safe and Drug Free Schools.) These two cities are located in densely populated urban areas and face school improvement challenges that have received national media attention. Invitations will be structured to ensure that attendees represent the diversity of education stakeholders in the mid-Atlantic. Those who cannot attend in person will be invited to attend via teleconference. The sessions will be structured so as to produce a prioritized needs assessment from in-person as well as remote attendees. The synthesized transcript of the sessions will be posted on the Web and shared among education stakeholders throughout the outreach network.

In subsequent years, these open hearings/teleconferences will rotate throughout the region, to other cities such as Pittsburgh and Trenton. To ensure that the needs assessment reaches the mid-Atlantic's rural areas, M-CARE will also schedule open hearings/teleconferences for sites on the Delmarva peninsula (for eastern shore Maryland and Delaware), western Maryland, western Pennsylvania, mid-Pennsylvania, and northeastern Pennsylvania, beginning with one teleconference in the first year of the contract. Some of these areas already have extensive teleconferencing networks.

Database Development and Analysis of Regional Needs

The findings of the annual surveys and the open hearings/teleconferences will provide the core content of the Regional Needs and Responses (RNR) Database. These will be analyzed and entered so as to reflect at least the following categories:

- Academic achievement and curriculum
- Professional development strategies
- High school reform
- Teacher quality
- Accountability systems
- Testing
- Education Technology
- English language learners
- School programs to improve behavior, character, and responsibility.

The separate entries within each category will show the source of the need (i.e., open hearing, annual parent survey), the date, and the specific category of help requested.

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Management and Referral of Needs Assessment Results

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Regional Needs and Responses Database

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Referrals for Assistance

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The M-CARE Role in Training and Technical Assistance

Regional education labs are authorized to provide training and technical assistance to SEAs, LEAs, school boards, State boards of education, and schools funded by the Bureau of Indian Affairs. This role includes providing training and technical assistance to support the administration and implementation of programs under the recently reauthorized ESEA. The assistance provided should be based upon scientifically valid research and cover such topics as:

- Teaching methods, assessment tools, and high quality, challenging curriculums (at least in math, science and reading)
- English language acquisition
- Education technology
- The replication and adaptation of exemplary and promising practices and new educational methods, including professional development strategies and the use of education technology to improve teaching and learning.

Because the M-CARE is charged with ensuring that the research base that is the underpinning of all its activities meets IES standards for scientifically valid research, the M-CARE team plans to focus its attention on that challenging work. Our technical assistance and training activity will be coordinated with the ED Regional Comprehensive Centers and through the NLN to focus our resources where the need is greatest and avoid duplication of services. We recognize the primary role of the ED Regional Comprehensive Centers in training and technical assistance and commit M-CARE to the collaborative model essential to its work.

Essential Principles of Training and Technical Assistance

Technical assistance can be a powerful bridge between research and practice. There are four key principles that underlie the M-CARE approach to technical assistance:

- Technical assistance can and should be delivered in a variety of ways, depending on the subject matter being presented and the learner receiving the information.
- Assistance offered should use research both in selecting/designing the material for presentation and in determining the best methods of delivery.
- Wherever possible, efforts should be made to take advantage of the expertise of practitioners themselves.
- The most successful TA efforts identify the needs of the community, select the best strategies/media to meet them, and evaluate their efforts to improve future practice.

The first principle relates to the fact that people learn in different ways, and some topics lend themselves more to one delivery mode than another. M-CARE will shape its activities related to technical assistance to embrace this variety.

The second principle states that M-CARE will call on existing evidence-based research and our Task 2 research and development projects to identify and synthesize the information most important to education stakeholders in the mid-Atlantic, and to determine how it could best be delivered. (b)(4)

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The third principle is supported by at least two important rationales for relying wherever possible on members of the educational community to share their expertise: first, because they *are* experts, and they relate to other members of the educational community much more effectively, in many cases, than do outside personnel. Often, this close connection means their message and the lessons they are trying to get across resonate more with the recipients. Second, because adults are active learners, communicating lessons to others is not only a valuable learning experience for the *recipients* of the information, but often for the *deliverers* as well. This principle reflects our understanding technical assistance process as a community of practice.

The fourth and final principle also speaks to a continuous improvement mindset that is woven throughout our proposed approach.

The Community of Practice Model for Training and Technical Assistance

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³ Wenger, Etienne (1998). *Communities of practice: Learning, meaning, and identity*. Cambridge University Press.

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Products Produced for TA and Training Purposes

The M-CARE team will produce and organize research findings into policy briefs and other training and technical assistance products for practitioners and policy makers. These products will be based on scientific research material available through such research entities as the What Works Clearinghouse, the IES National Centers, and others.

Policy Briefs and Other Publications

The M-CARE team will produce policy briefs and other training and technical assistance products that are based on scientific research. These products will take a variety of forms, all shaped by the purpose of getting information to education stakeholders that they will find easy to understand and to apply in their circumstances. Policy briefs and decision-making guides will be excellent resources for superintendents, principals, and state officials, but we will need to devise other approaches to reach parents and other stakeholders.

Web-based Avenues

All the print products produced by the M-CARE team will be made available through its Communications Center on the NLN Web site. The Internet capabilities make possible many other formats, particularly interactive structures that could make the results of scientific research available to practitioners and policy makers in very user-friendly forms. (b)(4)

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Educators can access the online database and review a range of technology-based learning strategies and an up-to-date summary of all studies conducted about each. The purpose is to give educators quick and easy access to unbiased and scientific research findings that document the

effectiveness of technology-based learning tools, enabling them to make better choices about how to invest the school or district's technology resources wisely.

Dissemination of Products

M-CARE's products will be made available through the National Laboratory Network and the national education dissemination system, including the What Works Clearinghouse, ERIC, the National Library of Education, and the IES research centers. See Task 4 for a more detailed discussion of our plans for regional dissemination.

Subtask 1.2 – Fast Response Applied Research and Development Projects

In its March 2005 report the Mid-Atlantic Regional Advisory Committee (RAC) raised two fundamental concerns about data in the field of education: first, that most stakeholders do not have access to good data, and second, that when such data are made available, they are usually made available in formats that are incomprehensible to many.

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Later in this section we propose five topics for Fast Response Projects that we are prepared to undertake in the first year of this contract. We will consult with ED and recognize that this list may be adjusted and refined in the early stages after contract award. Within 10 weeks from the contract's start date, we will submit to ED revised plans for these Fast Response Projects, including the policy briefs and other products that we will complete during the contract's first year.

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Conducting Fast Response Applied Research and Development Projects

The partners bring a wealth of experience in synthesizing and presenting research findings to inform practice in education. (b)(4)

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The systematic approach that M-CARE is proposing for Fast Response Applied Research and Development Projects (delineated below) incorporates five phases of development (delineated below) to ensure a final product based on scientific research and attuned to the needs of policymakers and practitioners. (b)(4)

(b)(4) We will tailor this approach to the specific requirements of M-CARE. The five phases are:

Locating and accessing information. M-CARE Rapid Response Research Analysts will search both published and unpublished searches, generally working from secondary sources (reviews of research) to primary research (journal articles documenting original research).

Recording the information. M-CARE analysts will document the information systemically using protocols to track information sources and the information contained in those sources.

Evaluating the information. M-CARE analysts will use the WWC standards to assess studies or interventions that assert causal impact, looking for quality experimental or quasi-experimental evidence to undergird the claims. For qualitative evidence, analysts will make use of the American Evaluation Research Society standards and other indicators of high quality work that support study findings. In all

cases, we will assure careful and accurate assessment of the quality of the evidence in providing reports to the field.

Analyzing the information. Depending on the topic, the Rapid Response Research Analysts may conduct analyses based on longitudinal data sets, descriptive studies of an issue, summarize existing studies, appraise current research, use models, or conduct limited field work to “fill in gaps” where it can be feasibly and quickly done.

Organizing and writing the product. The final products will consist of policy or research briefs, reports, or other products that provide valid research findings organized according to findings, themes, and implications for practice. Every product will be written and formatted so as to be useful to practitioners and policy makers, whether as background to inform decision-making, or for use in training or technical assistance.

Since we plan to recruit Fast Response Review teams from experts and specialists among the core team partners, we have included multiple points of review in the development of Fast Response Projects. Multiple members of the team will review the project’s progress internally, including staff members who are subject matter experts and editorial experts.

Product Development

To achieve the purposes of the Fast Response Projects, the products developed must convey information concisely and accurately, in forms that are user-friendly, and be disseminated in a timely and responsive fashion that ensures all stakeholders have access to the products. The M-CARE partners have the collective capacity and expertise to commit to the REL contract a full range of product support services to meet these goals. We also are committed to following all ED-established guidelines for product development and format, with which our partners are also experienced. We will rely on the Government Printing Office *Style Manual* and ED editorial style guidelines, as well as Federal standards for the use of logotypes and artwork.

Editing, design, and production are among the strengths of the M-CARE team. We employ editors who are experienced in working with government clients and subject matter experts to execute high-quality products according to client specifications. We have a rich portfolio of well-designed, visually pleasing print products. We have a time-tested process for conceptualizing designs, generating prototypes for review by clients, incorporating feedback, and producing camera-ready copy.

At all stages of the process, our experienced product development and production staff assess and incorporate issues such as timelines, quantities, budget, and dissemination. Our staff stays in step with the latest developments in print technology (such as digital presses designed for small, four-color print jobs), so that we devise production plans that ensure the highest quality, along with the biggest “bang for the buck.”

Many of ED’s reports and briefings reach some of the highest levels within the Federal agency structure and U.S. Congress, which requires M-CARE’s commitment to products that are error-free and delivered on schedule. We have developed a track record for producing timely and high-quality research products, ranging from white papers to full reports with numerous graphics, and from fact sheets to executive-level briefings.

M-CARE is also prepared to furnish graphical and audio-visual (A-V) development services to transform ideas and information into tangible products that educators, parents, and others will find appealing and useful. Our experience encompasses electronic publications, Web-based publications, and a variety of audiovisual materials, including audiotapes and videos suitable for in-service training.

Throughout this contract, M-CARE will apply a rigorous product review and quality assurance process. Our proposed process includes an up-front meeting with ED to discuss the layout and structure of each product. After an initial draft of the product is developed, an editorial staff member will review the product against a quality control checklist. The project director will subsequently conduct a final review of the product using the same quality control checklist. The draft document will be sent to ED for review and comment at least one month before the projected date of publication. Upon the return of comments, the M-CARE team will revise and resubmit to ED within two weeks, working closely with ED to finalize the product.

Throughout the development of these products, *access* must be a consideration. M-CARE products will use clear and engaging language and be free from the jargon so often found in writing about education. We will also consider language in another sense—the fact that English is often not the dominant language of families with children in the schools of the mid-Atlantic region. And as the Mid-Atlantic RAC report notes, both knowledge levels and “need to know” vary among stakeholders. Detailed information concerning Federal regulations would be valuable to State officials, but few others; it would be more important for parents, for example, to understand the right to choice under NCLB and perhaps the use of assessment data to guide their choices.

Dissemination, discussed under Task 4, also requires attention to access. College-educated, middle-class parents with ready Internet access may prefer to receive Web-based communications, but families with fewer resources or English language skills might find this to be a barrier. (b)(4)

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Finally, district, State, and school policymakers and practitioners face real world deadlines. They often need analyses to help inform their decisions by a date certain. The M-CARE team will ensure that it is informed about pertinent deadlines in the mid-Atlantic region, and considers these in scheduling Fast Response Projects. Whether or not deadlines loom, however, M-CARE will adhere to the principles of *timeliness and responsiveness* in conducting its work, understanding that the need to improve student achievement is of pressing concern to all stakeholders in the U.S. education system. No Fast Response Project will take more than twelve months to complete, and whenever possible, they will be completed in less time.

2006-2007 Fast Response Applied Research and Development Projects

We propose five specific topics for Fast Response Applied Research and Development Projects that we are prepared to undertake during the first year of the contract, and several other topic areas within which we expect to develop one or more additional specific projects after more detailed assessment of

regional needs. Our recommendations are based on our review of educational needs in the mid-Atlantic region, based on the research available to us, as well as the in-depth knowledge of the region that the M-CARE team brings to the table. Some of these topics reflect the challenges posed by the No Child Left Behind Act, while others have been given new focus by the legislation. For example, the 2005 Mid-Atlantic RAC makes note of the many issues posed by the NCLB Act for which the scientific research is yet to be done or its results assembled, thus leaving educators with concerns and confusion as to how best to proceed while the scientific evidence is being incrementally built. This gap is a major challenge for M-CARE to address, seeking to fill it with the best information and advice available at this time.

The five projects we propose to initiate in year one include: data-driven decision-making; value-added assessment; alignment of standards, instruction and assessment; family involvement; and professional development for teachers. All these topics are critical priorities within the region and are of substantial interest. In addition, we believe that two broader topics—teacher quality and education technology—are worthy of early attention, but that specification of these parameters should occur after early efforts to determine the regional needs more precisely and explore the likely direction of related work on these topics by the other labs. In the following section we provide a preliminary plan for conducting first response research for each of the five priority areas listed above.

Data-driven Decision Making

Rationale

Many policy makers and educational leaders are calling for data-driven decision-making, but techniques for effectively and systematically identifying and applying what data are available or easily obtained are little understood or rarely shared with school districts and other education stakeholders. Since understanding and applying reliable data can be one of the most powerful tools to bring about needed changes and improvement, it will be very useful for M-CARE to provide educators in the mid-Atlantic with guidance and best practices on the effective use of data in decision-making contexts. These tools could enable principals and superintendents as well as State education officials, to make decisions that are based on documented facts about students and their patterns of achievement.

Key Issues Pertaining to Data-driven Decision-making

Data-driven decision-making is hampered by a variety of factors in many settings.

- So much data is often available, but in such nonstandardized formats that it is difficult or confusing to sort out where to begin and what to select for use.
- The problem is often confounded by gaps or inconsistencies in data.
- Access may be limited to comparative data over appropriate time periods.
- Comparative data may also be problematic or not well understood.
- Stakeholders may not know how to access, evaluate, or apply what sound data does exist.

- Successful models or best practices for data-driven decision-making may not be accessible to the practitioners and policymakers who need them.

Description of the Research Plan, Study, or Data Sources

This project will begin with the collection of literature and other information both from within the region and nationally concerning effective and user-friendly systems that can serve as models or provide useful lessons about good practice or pitfalls to avoid in data-based decision-making. Direct contact will be made with State education agencies and selected districts to learn about useful experience and identify sources of expertise and data. The formation of a small working group from each state and a few localities will provide an important source of input and reaction to the work of the project team.

Important issues to be considered in the analysis include:

- Selection of standard information on which student groups and subgroups need to be explicitly identified
- Outcome measures, particularly student achievement data that will be used
- Approaches for measuring year-to-year progress
- Means for linking outcome information with curriculum and other key educational initiatives
- Project- and district-wide monitoring systems.

Plans for Analysis and Reporting

We visualize several interim reports on particular sub-issues and a summary report at the end of the project period. Some of these interim products may include:

- A descriptive analysis of specific State models that appear to be offering promising results
- An analysis of LEA systems that offer substantial promise of displaying systematic and useful results to all stakeholders, including students and parents
- An analysis of state level data banks that link student achievement data with curriculum information
- A descriptive analysis of systems that allows LEAs to assess information about other LEAs.

Plans for Coordination and/or Collaboration with Other Laboratories

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Description of the Training and Technical Assistance Strategies Proposed

Proposed strategies include: recommendations for State education officials that they conduct specific analyses of existing data in State data banks pertaining to student achievement in order to inform decision-making; a how-to workbook for principals seeking guidance on using building-level and comparative school data in their decision-making processes; and a two-page fact sheet explaining to families how to access important sources of data about their school, such as School Report Cards.

Notes on Dissemination

M-CARE will make the products available through the NLN and the national education dissemination system, including the What Works Clearinghouse, ERIC, the National Library of Education, and the IES research centers.

Timeline

Six-month project to commence in June 2006.

Family involvement

Rationale

It is widely accepted in the research community that the evidence shows a strong correlation between parent involvement and the academic achievement of their children.⁴ There is also evidence that there is a link between improved academic achievement and families that support their child's learning *at home*.⁵ It is also widely documented that parent involvement tends to fall off during the high school years (U.S. Department of Education 1997).⁶ Although traditionally, more attention has been devoted by both practitioners and policy-makers to the elementary years, there is evidence that the high school years are an extremely important time for students to have their families' support if they are going to achieve well academically. Engle (1989), for example, finds that students whose parents remained involved throughout their high school years were three times more likely to complete a bachelor's degree than the children of parents who were not.⁷

⁴ Ascher, C. (1988). Improving the school-home connection for poor and minority students. *The Urban Review*, 20, 109-123; Hickman, C.W., Greenwood, G.E., & Miller, M.D. (1995). High school parent involvement: relationships with achievement, grade level, SES, and gender. *Journal of Research and Development in Education*, 28, 125-134.

⁵ Epstein, J.L., Simon, B.S. & Salinas, K.C. (1997). Involving parents in homework in the middle grades. *Research Bulletin* No. 18; Jordan, G.E., Snow, C.E. & Porche, M.V. (2000). Project EASE: The effect of a family literacy project on kindergarten students' early literacy skills. *Reading Research Quarterly* 35(4); Starkey P. & Klein, A. (2000). Fostering parental support for children's mathematical development: An intervention with Head Start families. *Early Education and Development*, 11 (5).

⁶ U.S. Department of Education, Office of Educational Research and Improvement. (February 1997). Overcoming barriers to family involvement in Title 1 schools. Report to Congress. Washington, DC.

⁷ Engle, E. (1989, May). Socioeconomic status, family structure, and parental involvement. The correlates of achievement. Paper presented at the annual meeting of the American Educational Research Association.

Although new experiments in school and community collaboration are underway around the U.S., their effectiveness has not been determined. Because of the evident impact of family involvement on student achievement, and the falling off in the high school years, evidence-based research and best practices would be very valuable to practitioners in the schools as well as policy makers. It will also be valuable to explore the different forms of parent involvement, particularly divisions among school-based and home-based activities, since there is evidence that different forms have different impacts (Hoover-Dempsey, Bassler, & Brissie 1987; Ascher 1988).⁸

Key Issues Concerning Family Involvement to be Addressed

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Description of the Research Plan, Study, or Data Sources

This project would require a small project team of Rapid Response Research Analysts. The team would:

- Develop a protocol for the literature review covering published and unpublished reports
- Based on the literature review, develop an interview protocol with which to document information about family involvement initiatives underway with high schools in the mid-Atlantic States and nationally
- After the information collection phase, the findings would be structured in a consistent and preset way to facilitate analysis by the project team.

Plans for Analysis and Reporting

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⁸ Hoover-Dempsey, D.V., Bassler, O.C., & Brissie, J.S. (1987). Parent involvement: Contributions of teacher efficacy, school socioeconomic status, and other school characteristics. *American Educational Research Journal*, 24,417-435.

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Plans for Coordination and/or Collaboration with Other Laboratories

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Description of the Training and Technical Assistance Strategies Proposed

The topic of family involvement will lend itself to professional development for teachers as well as technical assistance at the administrative level in schools and districts.

Notes on Dissemination

M-CARE will make the products available through the NLN and the national education dissemination system, including the What Works Clearinghouse, ERIC, the National Library of Education, and the IES research centers.

Timeline

(b)(4)-month project to commence in April 2006

Teacher Professional Development

Rationale

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. There is also a significant body of research on teacher professional development.⁹ M-CARE proposes the topic of teacher professional development as an early subject for a Fast Response Research Project, both because it is a crucial need identified by practitioners in the region, and because there is evidence that teacher professional development, when done well, can have a decided and positive impact on the academic achievement of the students of those teachers. Wenglinsky (2000), for example, studied professional development in science and math, providing evidence that the changes in classroom practice attributable to that professional development had a

⁹ See, for example U.S. Department of Education, National Center for Education Statistics. (1998). Toward better teaching: Professional development in 1993-94. NCES 98-230. By Susan P. Choy and Xianglei Chen. Washington DC.

demonstrably positive effect on student achievement.¹⁰ Of course, among the thousands of hours of professional development in which teachers engage in each year, for much of it there is little evidence of any improvements that will translate into classroom practice likely to raise academic achievement.

Although the NCLB imposed an array of new requirements for teacher quality, it also provides, under Title II, for new policy initiatives in professional development.¹¹ Between the need and the opportunity presented by Title II, the timing seems excellent for a look at the evidence base for what works in teacher professional development.

Key Issues to be Addressed in the Fast Response Project

- Is there evidence-based research that documents the impact of teacher professional development and analyzes its various effects on teacher knowledge, classroom practice, and student achievement?
- What are the attributes of professional development opportunities that have an impact on student achievement?
- Are there significant differences among professional development opportunities in different subject areas?
- Have studies of teacher professional development looked at achievement gap issues and sought to redress these?
- Is there any evidence with which to identify best practices in teacher professional development?

Description of the Research Plan, Study, or Data Sources

A small project team of Rapid Response Research Analysts will:

- Develop a protocol for the literature review covering published and unpublished reports
- Examine selected studies from the literature review that are engaged in longitudinal studies of the impact of professional development which look closely at the efficacy of different practices¹²
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¹⁰ Wenglinsky, H. (2000). *How teaching matters: Bringing the classroom back into discussions of teacher quality*. Princeton NJ: Educational Testing Service.

¹¹ Poliakoff, A. R. (Ed.) (2002). *A Consumer's guide to teacher quality: opportunity and challenge in the No Child Left Behind Act of 2001*. Washington, DC: National Council on Teacher Quality.

¹² DeBoer, G. et al. (April 2004). *Research issues in the improvement of mathematics teaching and learning through professional development*. American Educational Research Association. The authors of this study are conducting a five-year study of the long-term impact of professional development activities on middle school teaching and learning in math.

Plans for Analysis and Reporting

The policy brief produced as a result of this Fast Response Project could have great utility for all educational practitioners and policy-makers engaged in contracting for professional development for teachers. They are offered an array of commercial products each year, and are well aware that the quality is extremely uneven. Any evidence-based guidance would probably be much appreciated. A brief guide for teachers (often as frustrated as their supervisors by the quality of professional development) to selecting professional development opportunities would help them choose judiciously among the many offerings those most likely to make a real difference in their classrooms.

Plans for Coordination and/or Collaboration with Other Laboratories

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Description of the Training and Technical Assistance Strategies Proposed

Ultimately, the policy brief can provide the basis for technical assistance to States, schools, and districts seeking to improve the caliber of the teacher professional development and focus its impact on student achievement.

Notes on Dissemination

M-CARE will make the products available through the NLN and the national education dissemination system, including the What Works Clearinghouse, ERIC, the National Library of Education, and the IES research centers.

Timeline

(b)(4) -month project to commence in May 2006.

Alignment of Standards, Instruction, and Assessment

Rationale

Over the two decades since the concept of alignment was first articulated, researchers have hypothesized that alignment among standards, professional development, curricula and assessment play a central role in the achievement of improved performance and major school reform. Alignment is a fundamental and driving goal in some States within the mid-Atlantic region. There is some evidence to suggest that when these major educational components are out of alignment, real progress toward improved student achievement goals is weakened or blocked. Evidence is also growing that alignment can

have a positive impact on achievement in schools that serve diverse student populations (Bushweller 1997).¹³

However, the empirical evidence in support of alignment has not yet been synthesized so as to translate its principles and strategies into an actionable form that States, school districts, and schools can apply. The fundamental concept of alignment is clear, but the strategies to successfully pursue it are less so. It appears appropriate to provide a user-friendly analysis and guide for practitioners and policymakers in the mid-Atlantic to have as a reference as they consider and pursue alignment objectives.

Key Issues Pertaining to Alignment to be Addressed

Because the concept of alignment is so comprehensive and systemic, it requires progress across a broad band of school activities, programs, and policies. The sequencing of strategies and implementation steps presents a wide range of choices and related questions:

- Within the multiple dimensions needed to achieve alignment, what activities should come first and what later?
- How should the connections among the component steps be maintained over the implementation period?
- What measures should schools, districts, and State agencies use to monitor progress toward broad goals as well as change at the level of student achievement?
- How can alignment be implemented by teachers, department heads, and curriculum developers?
- Is there evidence of the impact of alignment efforts at the classroom level?
- What institutional arrangements and processes have proved effective in keeping motivation, progress, and assessment in place as implementation moves toward the stated objectives?

These and related questions will be addressed to provide an overall analysis and guide.

Description of the Research Plan, Study, or Data Sources

This project will primarily be driven by:

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¹³ Bushweller, Kevin. (September 1997). Teaching to the test. *The American School Board Journal*. The National School Boards Association.

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A small project team would be assembled for the purpose of conducting the project. The research project would follow these steps:

- Development of a detailed protocol for the literature review covering published and unpublished reports.

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Plans for Analysis and Reporting

The Rapid Response Research Analysts would examine the strategies employed and the implementing structures, processes, and sequences for recurring and effective patterns, including any evaluation-based evidence of effectiveness. The findings will be assembled in a user-friendly report and appropriate electronic documents aimed at an audience of State and local educators and interested parent groups. A single family of reports is anticipated.

Plans for Coordination and/or Collaboration with Other Laboratories

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Description of the Training and Technical Assistance Strategies Proposed

Because the topic of alignment is so comprehensive and so process based, it lends itself to professional development and training strategies for technical assistance (Blank 2004).¹⁴ In collaboration with the ED Comprehensive Centers and other technical assistance providers, the M-CARE team would plan a variety of professional development activities targeted to the very different purposes of teachers, principals, and superintendents. The topic will be placed on the Governing Board agenda to invite State

¹⁴ R. K. Blank. (April 2004). Findings on alignment of instruction using enacted curriculum data: results from urban schools. Paper presented at American Educational Research Association meeting.

representatives to recommend ways that the findings from this Fast Research Project could be communicated and explored at the State agency level.

Notes on Dissemination

M-CARE will make the products available through the NLN and the national education dissemination system, including the What Works Clearinghouse, ERIC, the National Library of Education, and the IES research centers.

Timeline

(b)(4)-month project to commence in April 2006.

Value-added Assessment

Rationale

The concept of value-added assessment emerged in the 1980s as an alternative approach to assessing school and, ultimately, teacher performance by concentrating on assessment of longitudinal improvement in student achievement instead of relying strictly on student scores on standardized tests at specific points in time (e.g., the end of third grade). Dr. William Sanders has led the development of this concept and piloted its application for both school and teacher performance in Tennessee (Sanders & Horn, 1998).¹⁵

The national accountability movement, and particularly the NCLB requirements, have spurred both the interest and the concerns about value-added assessment among education policy-makers across the U.S. Simple in its basic concept, value-added means that student achievement should be measured in terms of improvement over time rather than in terms of annual test scores. In fact, value-added assessment is complex to implement, with respect to data collection requirements and statistical issues, and it is controversial with respect to its application in teacher evaluation (Kupermintz, 2005).¹⁶

Nevertheless, the threat of sanctions for failure to meet annual test standards, among other reasons, has fueled the interest in value-added assessment. Pennsylvania, for example, is conducting a large pilot test of a value-added system that ends in 2006. This particular application explicitly excludes its use as a teacher evaluation tool, but retains its use as an assessment tool for school planning. An effort to pull together a report on what we know about value-added assessment, what we are in the process of learning, and what we should be planning for future research appears very much in order.

Key Issues Concerning Value-added Assessment to be Addressed

The key issues to be researched are as follows:

¹⁵ W. L. Sanders and S. P. Horn, "Research Findings from the Tennessee Value Added Assessment System (TVAAS) Database: Implications for Educational Evaluation and Research" *Journal of Personnel Evaluation in Education* 12 no. 3 (1998) 247-256.

¹⁶ H. Kupermintz, Chapter 11: Value-Added Assessment of Teachers, in "School Reform Proposals: The Research Evidence," Education Policy Studies Laboratory, http://www.asu.edu/educ/eps/EPRU/epru_Research_Writing.htm

- What applications of the value-added concept have been tried, with what purposes and with what success?
- What data problems have been faced, resolved, or avoided in developing these applications? Has anyone analyzed or tried to incorporate information beyond student course achievement over time and with what result?
- What are the statistical problems that have been raised, how have they been met, and with what acceptance?
- What uses have been made of the assessment data and with what impact on school performance?
- How have the concerns of the various stakeholders been managed?

Description of the Research Plan, Study, or Data Sources

This project will require a strong and perhaps slightly larger Rapid Response team to conduct the work over an eight-month period. The research will also require some special skills to manage the statistical challenges likely to arise, perhaps from the TWG. The project will consist of the following elements:

- It will start with a thorough literature review of published and unpublished materials. It will include contact with the known initiatives in progress to obtain as much information as possible about their progress and findings. It will be structured around the questions raised above.
- Once the literature/information review is complete, the project team with its consultants will determine which initiatives (fewer than 10) should be singled out for case study work. This work will be undertaken with a set of protocols so that the results can be presented in a standard framework for further analysis.
- The research team and its advisors will analyze the cumulative information to assess what conclusions can be drawn and with what level of confidence, and what issues should be highlighted for future research work.

Plans for Analysis and Reporting

The report will be written for an informed, but nontechnical audience with one or more appendices added concerning statistical issues of importance to the technical audience.

Plans for Coordination and/or Collaboration with Other Laboratories

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Exhibit III-1.10 presents a timeline for Task 1 tasks and subtasks, and Exhibit III-1.11 presents a Task 1 schedule.

Description of the Training and Technical Assistance Strategies Proposed

Because of the complexity of value-added assessment as a research topic, the products that emerge from this Rapid Response Research Project will probably be focused primarily on policy-makers, taking the form of policy briefs and presentations at regional and national gatherings of education researchers and discussions among policymakers. M-CARE will consult with ED as to other strategies for technical assistance.

Notes on Dissemination

M-CARE will make the products available through the NLN and the national education dissemination system, including the What Works Clearinghouse, ERIC, the National Library of Education, and the IES research centers.

Timeline

(b)(4)-month study to commence in May 2006.

We will repeat a similar process each year to update topics and specific activities for fast response applied research. We will use the annual needs assessment and the work of the other Labs and Regional Comprehensive Centers to change, add, or continue research on these topics.

**Exhibit III-1.10
Proposed Timeline and Schedule
Task 1**

MONTHS*	YEAR FOUR												YEAR FIVE											
	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58		
Task 1.1. Regional Education Needs Analysis, Training & TA Response Unit																								
1 Report to ED on Establishment of Needs Analysis & TTA Response Unit																								
2 Create Regional Needs and Responses Database and maintain throughout contract period																								
3 Revise and submit Fast Response Plan																								
4 Submit monthly progress reports																								
5 OMB clearance for annual needs assessment survey																								
6 Administration of annual needs assessment survey																								
7 Draft report on needs assessment survey submitted to ED																								
8 Schedule open hearings/teleconferences																								
Task 1.2 Fast Response Applied Research and Development Projects																								
1 Revised plans and schedules for year 1 Fast Response Applied Research & Development Projects																								
2 Updated plans and schedules for years 2-5 Fast Response Projects (see task 5.1)																								
3 Fast Response Project #1																								
4 Fast Response Project #2																								
5 Fast Response Project #3																								
6 Fast Response Project #4																								
7 Fast Response Project #5																								
8 Draft policy briefs/products for each Fast Response Project																								
9 Final policy briefs/products for each Fast Response Project																								
10 Monthly progress reports on Applied Research and Development Projects																								

* Anticipated start date is April 2006
 ▲ = Deliverable
 ■ = In Progress

Exhibit III-1.11 Schedule of Deliverables/Milestones Task 1: Regional Educational Needs Analysis, Training and Technical Assistance, Fast Response Applied Research and Development Projects	
Deliverable	Due Date
1.1 Regional Education Needs Analysis Training And Technical Assistance Response Unit	
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Create and Maintain Database	April 1, 2006-March 31, 2010
Revised Fast Response Plan	April 1-June 15 every year
OMB Clearance Package (If required)	April 15 -October 15 every year
Documentation of IRB Approvals (If required)	April 1- July 1 every year
Monthly Progress Reports	May 1-May 10, 2006 and every month thereafter through March 2011
1.2 Fast Response Applied Research and Development Projects	
Revised Plans and Schedules for Year 1 Fast Response Applied Research and Development Projects	April 1-June 15 every year
Updated Plans and Schedules for Years 2 through 5 Fast Response Applied Research and Development Projects	June 1-July 1 2007-2010
OMB Clearance Package (If required)	April 15 -October 15 every year
IRB Documentation (If required)	April 1- July 1 every year
Monthly Progress Reports on Applied Research and Development Projects	May 1-May 10, 2006 and every month thereafter through March 2011
Draft Policy Briefs and/or Products for each Fast Response Project	One month after completion of project throughout contract
Final Policy Briefs and/or Products for each Fast Response Project	One month after submission of draft throughout contract

TASK 2: RIGOROUS APPLIED RESEARCH AND DEVELOPMENT

Authors: (b)(6) PSU (b)(6), Caliber

Key Staff: (b)(6)

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Deliverables: Revised Detailed Research Plans and Schedules; Monthly Progress Reports; Updated Plans for Rigorous Studies; TWG Plans; TWG Minutes and Agenda; OMB Clearance Forms; IRB Approval Documentations; Privacy Act System of Records Notice (if required); Data Collection Instruments; Proposed List of Sites; Protocols; Technical Reports; Non-technical Reports

The mission of the Institute of Education Sciences, put succinctly, is “to transform education into an evidence-based field.” To do so requires two fundamental undertakings: establishing a “rigorous and relevant research base” and putting into place “effective dissemination strategies.”¹ M-CARE is committed to supporting the Institute’s mission in both respects. Task 4 provides our plan for dissemination. The discussion of Task 2 that follows sets forth M-CARE’s proposed program of rigorous applied research and development to meet the educational needs of the Mid-Atlantic region and its stakeholders.

To set the context, we first discuss the fit between M-CARE’s proposed rigorous research program and the mission and priorities of the Institute of Education Sciences (IES), including its emphasis on evidence-based research. Next, under Task 2.1, we present detailed research plans for the six specific studies that M-CARE is proposing. Under Task 2.2, we set forth the draft plan for the external technical working group (TWG), including the list of proposed TWG members, their affiliations and areas of expertise. In 2.3, we review our understanding and approach to forms clearance, including OMB and IRB. Section 2.4 provides our understanding for data collection, site selection, and site visits. Lastly, we discuss our processes for conducting data analysis and preparing reports.

New IES Priorities

As summarized by its director, Grover J. Whitehurst, the Institute’s “goal is to generate continuous improvement in education in the nation by making the practice of evidence-based education routine.”² IES provides national leadership in educational research and development, from early childhood through postsecondary study.

At its September 6-7, 2005 meeting, the National Board for Education Sciences approved new research priorities for IES. The overarching priority is “research that contributes to improved academic achievement for all students, and particularly for those whose education prospects are hindered by inadequate education services and conditions associated with poverty, race/ethnicity, limited English

¹ Grover J. Whitehurst, Director of the Institute of Education Sciences, Statement on Research Methods, April 21, 2005. <http://www.ed.gov/about/offices/list/ies/statement042104.html>

² Grover J. Whitehurst, Director of the Institute of Education Sciences, Director’s Welcome to IES, <http://www.ed.gov/about/offices/list/ies/director.html>

proficiency, disability, and family circumstance.” Within this major priority, the Institute focuses on different outcomes by stage of educational development:

- *Infancy and preschool period*: outcomes that enhance readiness for schooling, for example, language skills, and for infants and toddlers with disabilities, developmental outcomes.
- *Kindergarten through 12th grade*: the core academic outcomes of reading and writing (including reading and writing in the disciplines), mathematics, and science. Also behaviors and social skills that support learning in school and successful transitions to employment, independent living, and postsecondary education.
- *Postsecondary*: enrollment in and completion of programs that prepare students for successful careers and lives.

IES endorses the same outcomes for students with disabilities, including functional outcomes that improve educational and transitional results.

M-CARE Priorities

Based on the needs of our Mid-Atlantic constituents, examined earlier in this document, M-CARE has established a set of priorities to pursue through its program of rigorous applied research. These priorities are:

- Improving academic achievement of subgroups, and
- Increasing student achievement in content areas.

M-CARE’s decision to address the academic achievement of subgroups through its research agenda meshes with the overarching priority adopted by the National Board for Education Sciences a few weeks ago. Our specific research studies also address the core academic outcomes for K-12 of literacy, math, and science as well as strategies that support learning.

To address these priorities, we have proposed six studies. Each is based upon well-defined questions and clearly pertinent to high priority needs in the region.

- The Effects of **CompassLearning’s Odyssey Math** Software on the Mathematics Achievement of Sixth-Grade Students
- The Effects of **Authentic Assignments** on Achievement in Mathematics, Science, and Reading Comprehension at the High School Level
- The Effects of the **Web-based Inquiry Science Environment (WISE)** on Achievement in Mathematics and Science in Middle School Students
- The Effects of **Concept Mapping and the Use of Graphic Organizers** on Reading Comprehension in the Content Areas

- The Effects of the **Advancement Via Individual Determination (AVID) Program** on Achievement in Mathematics, Science, Reading, and High School Completion Rate
- The Effects of the **Cognitive Apprenticeship Approach to Teaching Reading** on the Reading Comprehension (b)(4)

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In selecting specific interventions, we followed the criteria laid out in the RFP and its amendments. We purposely selected interventions that (1) did not duplicate ongoing research at ED or within IES, (2) are amenable to random-controlled tests, (3) met the needs of the region, and (4) were based on research indicating promise for effectiveness.

Exhibit 2.1 provides our proposed schedule for staging the studies as well as the lead partner for each study:

EXHIBIT 2.1 PROPOSED SCHEDULE FOR TASK 2 RIGOROUS STUDIES			
Study Name	Start Date	End Date	Lead Partner
CompassLearning Odyssey Math	4/1/06	3/31/08	Penn State
Authentic Assignment	4/1/06	1/31/09	Metiri
WISE	4/01/07	3/31/09	Metiri
Concept Mapping	9/01/07	10/31/10	Metiri
AVID	(b)(4)	6/30/10	Rutgers
Literacy/Cognitive Apprenticeship		1/31/11	Rutgers

We will, of course, want to refine and further consider our suggestions, after receiving the contract, in light of the planned agendas among the labs and the status of other work being sponsored by ED to insure the best fit for the national effort.

The IES Vision of Evidence-Based Research

The agenda of rigorous research studies that M-CARE proposes to conduct under Task 2 is designed to provide causally valid answers and follow IES standards, as described in the IES authorizing legislation. All of M-CARE's proposed research projects are randomized controlled trials, and all will be conducted in schools. The Institute prefers the use of randomized field trials to examine the effectiveness of mature programs and practices, asserting that such practice usually produces process data that may illuminate "why an intervention does or does not work" and permit researchers to analyze relationships between implementation and outcomes.³

³ Grover J. Whitehurst, Director of the Institute of Education Sciences, Statement on Research Methods, April 21, 2005. <http://www.ed.gov/about/offices/list/ies/statement042104.html>

Task 2.1 Detailed Research Plans for Rigorous Studies

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Overview of Our Approach to Experimental Research Design

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Randomization

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The Effects of CompassLearning's Odyssey Math Software on the Mathematics Achievement of Sixth Grade Students

Author: (b)(4)

(b)(4)

Mathematics are an integral part of science, technology, and many other aspects of modern life, from basic home bookkeeping to the modeling of complex systems. The *No Child Left Behind Act* articulates the importance of math for American students and mandates that all students become proficient in mathematics, as measured by standardized tests. In response to this mandate, American schools are using computer-based mathematics curricula to provide or reinforce primary mathematics instruction. While some products appear to have promise, few have undergone the scientific scrutiny that might be expected for a product widely used to increase mathematics achievement.

As an example, CompassLearning's "Odyssey Math" product appears to have promise but has a very minimal and flawed research base. The company reports, "All CompassLearning Odyssey solutions are backed by research, expertise, and experience, and have been proven to increase academic achievement in a variety of settings and across all content areas⁶," but both the "What Works Clearinghouse⁷" and "Technology Solutions that Work⁸" research reviews related to this product find the previous investigative methodologies seriously deficient. Despite the absence of high-quality research, schools are investing large amounts of money and instructional time to use the Odyssey Math products in elementary classrooms. According to the company, "CompassLearning has programs in more than 20,000 schools and serves approximately 10.6 million students nationwide." This high level of use justifies a scientific investigation into the product's value.

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⁶ Vendor website: <http://www.compasslearning.com/research/> September, 12, 2005.

⁷ What Works Clearinghouse, September 12, 2005: <http://www.w-w-c.org/Intervention.asp?iid=15&tid=03&ReturnPage=InterventionAll.asp>

⁸ The Metiri Group, September 13, 2005: www.metiri.com/techsolutions/

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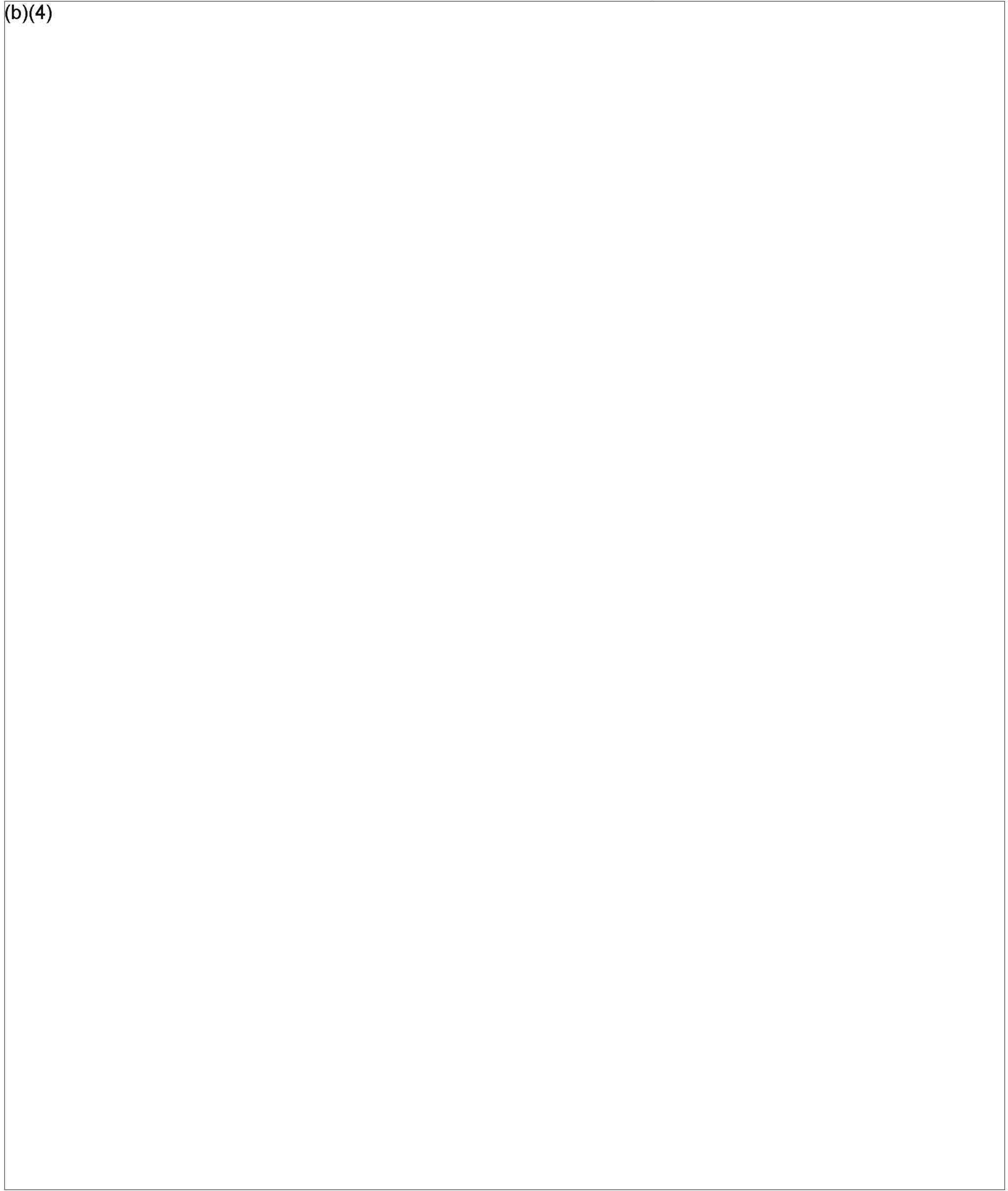
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The Effects of Authentic Assignments on Achievement in Mathematics at the High School Level
Author: (b)(4)

(b)(4)

Much attention is being given around the nation to the disengagement of students from the learning process, particularly at the high school level. "The most immediate and persisting issue for students and teachers is not low achievement, but student disengagement. Student engagement is critical to educational success; to enhance achievement, one must first learn how to engage students."¹¹ There is a national trend, particularly among high school seniors, towards the devaluing of work done in schools.¹² Several approaches to reengaging students have been proffered across the nation. Problem-based learning initiatives, where learning is organized around "messy" real-world problems, have been in place from K-12 education through medical and professional schools since the late 1980's.¹³ At the high school level, service learning programs have become popular, partly in response to concerns about the disengagement of seniors who have completed most requirements and have been accepted for postsecondary study.¹⁴

Finally, if students are to achieve in meaningful ways, we need to provide them with opportunities to do work that is of high intellectual quality. Traditionally, high intellectual quality means work that addresses appropriate content or, more commonly, standards, and that is accurate or consistent with what is considered to be the best understanding of experts in the field.¹⁵ A third criterion is authenticity.¹⁶ In order to be "authentic," a lesson, task or student performance needs to exhibit three characteristics:

- It must involve **knowledge construction**, i.e., students must apply the facts, concepts and skills that they learn in the construction of some knowledge product or new understanding.
- Students must use **disciplined inquiry**, i.e., develop an adequate base of knowledge and an in-depth understanding of the content and methods of the discipline that is exhibited through complex communication of ideas central to the discipline.

¹¹ Newmann, Fred M. (Ed). (1992). Student engagement and achievement in American secondary schools. New York, NY: Teachers College Press.

¹² U.S. Department of Education, National Center for Education Statistics. (2002). The Condition of Education 2002. NCES 2002-25. Washington, DC: U.S. Government Printing Office.

¹³ DeLisle, Robert. (1997). How to use problem-based learning in the classroom. Alexandria, VA: ASCD; Glasgow, Neal. (1997). New curriculum for new times: A Guide to student-centered, problem-based learning. Thousand Oaks, CA: Corwin Press; Torp, Linda & Sage, Sara. (2002). Problems as Possibilities: Problem-Based learning for K-16 education. Alexandria, VA: ASCD.

¹⁴ Kinsley, Carol & McPherson, Kate. (1995). Enriching the curriculum through service learning. Alexandria, VA: ASCD; Stanton, Tim et al. (1999). Service-learning: A Movement's pioneers reflect on its origins, practice, and future. San Francisco, CA: Jossey Bass.

¹⁵ Newmann, Fred M. (Ed.). (1992). Student engagement and achievement in American secondary schools. New York, NY: Teachers College Press.

¹⁶ Newmann, Fred et al. (1995). A Guide to authentic instruction and assessment: vision standards and scoring. Madison, WI: Wisconsin Center for Education Research. pp. 8-13.

- The performance must have **value beyond the school**, i.e., the work must have meaning or value that transcends the student-teacher relationship and is not simply used to rate the performance of the student for grading purposes. This value may be a result of sharing the work in a meaningful way with an audience outside the classroom. It may also have value simply because the topic and product are personally valued by the student. Or it may be that the product or task closely mirrors the kind of work done in the real world and that relationship is clearly evident to the student.¹⁷

A set of standards describes these three characteristics of authenticity as they apply to classroom instruction, student assessment and student performance. Each standard is accompanied by field-tested rubrics; one, an analysis of the role of authenticity in promoting student achievement in school reform projects over a five-year period¹⁸ and the other, a study of the relationship between authentic work and student achievement in 200 classrooms in the Chicago Public School System.¹⁹ There is a strong, correlational relationship between the authenticity of the work assigned in classrooms and student achievement. Unfortunately, despite the compelling nature of these correlational findings, no experimental studies exist to validate the role of authenticity in promoting achievement. There may, of course, be several other explanations for the differences in achievement. One explanation is that the quality of assignments may simply be an artifact of teacher quality, which evidence suggests is strongly related to student achievement.²⁰ What is needed is experimental support for a causal relationship between intellectually rigorous work and student achievement.

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¹⁷ Ibid.

¹⁸ Ibid.

¹⁹ Newmann, Bryk & Nagaoka. (2001). Authentic intellectual work and standardized tests: Conflict or coexistence? Chicago, Illinois: Consortium on Chicago School Research.

²⁰ Sanders, William & Horn, Sandra. (September 1998). Research findings from the Tennessee Value-Added Assessment System (TVAAS) Database: Implications for educational evaluation and research. *Journal of Personnel Evaluation in Education*; 12 (3).

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Year Two through Five Studies

In the following section, M-CARE provides details on the studies we are proposing to conduct during Years Two through Five, presented in the chronological order of their proposed implementation. These studies focus on two subject areas: science and literacy.

The Effects of the Web-based Inquiry Science Environment (WISE) on Achievement in Science in Middle School Students

Author: (b)(6)

(b)(6)

Strong programs in science and mathematics education are essential for today's students and for the nation. Jobs with the greatest projected employment growth, like computer programming, depend on a sound education in mathematics and science. The *No Child Left Behind Act* recognizes the importance of both subjects, and requires that student performance be measured by standardized tests. In response, schools are seeking instructional materials for mathematics and science education proven effective using rigorous, scientifically-based research methods. Unfortunately, few mathematics or science instructional materials have a rigorous research base.

One promising science education program is WISE²⁴, the Web-based Inquiry Science Environment developed (b)(4). WISE is a free, on-line science learning environment for students in grades 4-12. Using the Internet, students work on real-world inquiry projects that include topics such as genetically modified foods, earthquake prediction, and the deformed frogs mystery. Students learn about, and respond to, contemporary scientific theories through designing, debating, and critiquing solutions. The students use a web browser to take notes, discuss theories, and organize their arguments. In addition, classroom activities, such as experiments or class debates, play an integral role in a project's lesson plans. Interaction is an important component of WISE. Students collaborate in pairs to share ideas and support each other. Meanwhile, the teacher circulates among the students, discussing their progress and ideas. The teacher frequently reconvenes the class to discuss findings and questions.

We propose to conduct a scientifically based research study to determine if WISE is effective in increasing student achievement. The study will focus on students in the middle grades, a critical time because students are beginning to make decisions about which science courses to take in high school. Furthermore, many science teachers in the middle grades are teaching out-of-field, making it especially important that the instructional materials they use are proven effective.

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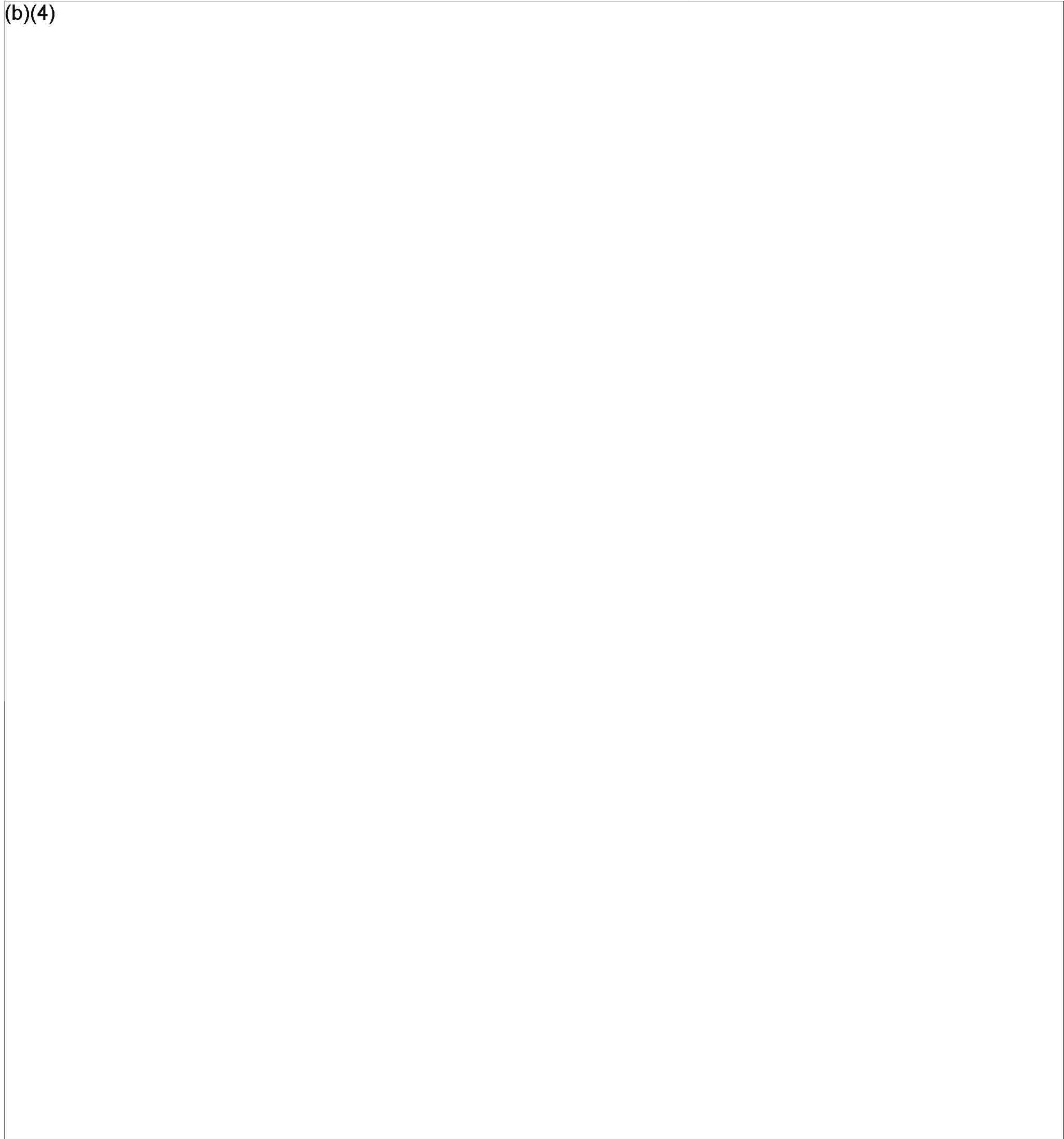
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**The Effects of Cognitive Mapping and the use of Graphic Organizers
on Reading Comprehension in the Content Areas**

Author: (b)(6)

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While educators continue to debate the virtues of phonics vs. whole language instruction for the teaching of reading, NAEP results indicate that, regardless of method, most American children do master at least low levels of reading and word decoding.²⁷ At the age of 13, 95% of Americans have basic reading skills, but too few have acquired the higher skill of reading comprehension—they can decode, but may not yet comprehend what they have read. This statistic is surprising, given research that clearly demonstrates that reading comprehension can be taught.²⁸ The National Reading Panel (NRP) analyzed 203 studies in 16 areas of comprehension strategy instruction and found that seven had a solid scientific basis for classroom use leading to improved comprehension with non-impaired readers. The seven strategies, judged to be more effective when used as a part of a multiple-strategy method, include:

- Comprehension monitoring: students learn how to be aware of their level of understanding of what they read.
- Cooperative learning: students learn reading strategies together.
- Graphic and semantic organizers (including story maps): students make graphic representations of the material to assist their comprehension.
- Question answering: students answer the teacher's questions and receive immediate feedback.
- Question generation: students ask themselves questions about various aspects of the text.
- Story structure: students learn how to recall story content in order to answer questions about what they have read.
- Summarization: students are taught to integrate ideas and generalize from the text information.

A frequently underutilized strategy is the graphic and semantic organizer, as a visual tool for reflection, communication, and problem-solving. To understand the power of visual learning one must examine research in psychology, cognition, and biology. The brain consists of short-term (working) memory in which thinking takes place, and long-term memory where schemata (e.g., structures of understanding) are stored. It was Piaget who first described learning as a two-phase process in which the actions at one level become

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²⁸ National Institute of Child Health and Human Development. (2000). Report of the National Reading Panel. Teaching children to read: an evidence-based assessment of the scientific research literature on reading and its implications for reading instruction: Reports of the subgroups (NIH Publication No. 00-4754). Washington, DC: U.S. Government Printing Office.

the objects of reflection at the next, culminating in learning—i.e., a reorganization of schema (in long-term memory).²⁹

Sweller's Cognitive Load Theory³⁰ is grounded in the same premise—that is, learning requires a connection to the schemas held in long-term memory. It is also grounded in the widely accepted premise of dual memory channels, one carrying text/sound based, and the other carrying visuals. Since all thinking is done in the working memory, the more sophisticated and complex the information held in working memory, the deeper the thinking. This would suggest that concept maps will increase comprehension because there is a limited number—seven (whether seven words, seven sentences, or seven complex schemas)—that can flow into the working memory at any one time. The optimum of course is schemas, since they bring a richer context for thinking and learning. This constitutes a reason to use concept maps—to help learners organize discrete pieces of information into schemata that should ultimately result in deeper, richer thinking and learning. Additionally, concept maps are visual, and visuals will add informational elements without overloading working memory, again, leading to increased learning.

Teachers who bring visualization into learning are increasing the number of elements students can think about at one time. Sweller⁵ recommends the following strategies to maximize information in working memory, while reducing cognitive overload:

- Change problem solving methods, using goal-free problems or worked examples, to avoid means-ends approaches that impose a heavy working memory load.
- Eliminate the working memory load that is associated with having to mentally integrate several sources of information by physically integrating those sources of information.
- Eliminate the working memory load that is associated with unnecessarily processing repetitive information by reducing redundancy.
- Increase working memory capacity by using auditory as well as visual information under conditions where both sources of information are essential (i.e. non-redundant) to understanding.

Concept maps—also known as story maps, graphic organizers, story webs, and semantic maps—are visual and graphic representations of elements and the relationship between these elements. As such, they offer an excellent opportunity for students to “visually think” about and visually represent stories and passages they have read. In doing so, students have the opportunity to represent similarities and differences, the direction of causality, hierarchical structures, flow processes, time sequences, etc.

Despite research that theoretically demonstrates the value of visuals for the learning process, most schools do not deliberately teach students to use visuals as tools for thinking, reflection, or

²⁹ Piaget, J. (1980). *Adaptation and Intelligence*. Chicago: the University of Chicago Press.

³⁰ Sweller, J. (1988). Cognitive load during problem solving: Effects on learning. In *Cognitive Science*, 12.

communication.³¹ This study will focus on establishing a causal link between the improved reading comprehension scores of struggling adolescent readers, and the use of concept maps generated by students with electronic tools to aid reflection, organization, and intervention. The intervention, described below, uses electronic concept maps, is grounded in research on visual learning and cognitive overload, and addresses three of the National Reading Panel's strategies for improving reading comprehension (i.e., comprehension monitoring, use of graphic organizers, and summarization).

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The Effects of the Advancement Via Individual Determination (AVID) Program on Achievement in Mathematics, Science, Reading, and High School Completion Rate

Author: (b)(6)

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In the last decade, the high school curriculum has received increased attention, because so many students leave without graduating or leave without the skills and knowledge needed to be successful in the workplace.³⁵ In recent years, numerous organizations (e.g., Bill Gates Foundation, ACHIEVE) have supported or advocated for new service models in high schools. American school districts and secondary schools have entered into partnerships with several school reform organizations, such as the Southern Regional Educational Bureau (SREB), the parent organization of High Schools That Work (HSTW), which claims schools in 31 states. The Coalition of Essential Schools (CES), founded by TheodoreSizer in 1984, has spread throughout the country and established twenty regions from Washington to Massachusetts. A third organization, AVID, founded by Mary Catherine Swanson in San Diego 25 years ago, has worked in 2,200 schools across the nation, and is the curriculum for the highly-rated Department of Defense schools overseas.

Advancement Via Individual Determination (AVID) is a widely used and rapidly growing program that appears to have promise, but little evidence-based research has examined its impact on student achievement. Several studies have noted that students enrolled in AVID also enroll in more Advanced Placement courses, take higher level math courses, and have higher college entrance and retention rates than those not exposed to AVID. The existing study designs imply plausible explanations for the differences, including the type of students who voluntarily engage in the program. In addition, these studies examined differences in terms of "box scores," comparing the students in the program with those who are not, and using variables such as enrollment in certain classes and admission to college, rather than examining the program's direct impact on student achievement in the content areas. None of the studies randomly assigned students to treatment or control groups.³⁶


Without scientifically valid research for AVID, schools nevertheless continue to invest large amounts of money and instructional time to implement it. In the Mid-Atlantic, for example, AVID continues to grow in New Jersey (in part due to an incentive grant from a New Jersey philanthropist), in Delaware,

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³⁶ Karen M. Watt, Charles A. Powell, Irma Doris Mendiola. (2003). Implications of one comprehensive school reform model for secondary students underrepresented in higher education. *Journal of Education for Students Placed at Risk* 9 (3); Elisa Cunningham, Christina Redmond, and Jamie Merisotis. (February 2003). Investing early: Intervention programs in selected U.S. states. Institute for Higher Education Policy; Larry F. Guthrie, Grace Pung Guthrie. (February 2002). The Magnificent eight: AVID best practices study. Center for Research, Evaluation and Training in Education.

and in Maryland. In Delaware, two of the state's 19 school districts have implemented AVID. This extensive investment by Mid-Atlantic schools in AVID warrants a more rigorous examination of the program. We intend to scientifically investigate the AVID program's effects on academic achievement, through a controlled experiment in which volunteers are randomly placed in the AVID program and in a control condition.

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**The Effects of the Cognitive Apprenticeship Approach to Teaching Reading
on the Reading Comprehension of Middle School Students**

Author: (b)(6)

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K-12 students are living in an information age that is redefining "literacy." The advent of the Internet, coupled with the increasing number of traditional forms of informational texts, present new possibilities for communicating and accessing information.³⁸ To meet the demands of the 21st century, students must learn to think critically, apply knowledge to new situations, analyze information, and comprehend new ideas.

The ways in which middle and high school students are taught to "read, comprehend and write about subject matter has not kept pace with the demands of schooling."³⁹ To be successful, students must develop the literacy skills that help them recognize when information is needed, and how to locate,

³⁸ Leu, D.J., Jr., Kinzer, C.K., Coiro, J., Cammack, D. (2004). Toward a theory of new literacies emerging from the Internet and other information and communication technologies. In R. Ruddell & N. Unrau (Eds.), *Theoretical Models and Processes of Reading, Fifth Edition* (pp. 1568-1611). Newark: International Reading Association.

³⁹ Carnegie Corporation. (2005). Carnegie Corporation of New York Corporation News: Education program description. New York: Carnegie Corporation of New York. Retrieved on August 28, 2005 from <http://www.carnegie.org/sub/program/education.htm>.

comprehend, evaluate, and use that information.⁴⁰ This is especially challenging for students who must read and comprehend informational texts across content areas. Comprehension of such materials generally creates greater challenges for readers than does narrative material.⁴¹ As students advance through school, it is essential that they acquire the strategies and skills needed to comprehend texts across content areas.

The majority of adolescents who experience reading difficulties do not need further instruction in phonics or decoding skills.⁴² Many adolescents do not have the opportunity and instructional support to read varied kinds of materials to build their experience, fluency, and range as readers. In addition, many middle school and high school struggling readers need teachers who will help them acquire and extend “the complex comprehension processes that underlie skilled reading in the subject areas.”⁴³ Increasing content area instruction at the primary level may also provide learners with an understanding of the strategies they will need in order to deal effectively with informational text. This instruction could prepare elementary students for content area instruction that usually begins in the fourth grade.

This study will conduct a rigorous investigation of the effectiveness of a treatment that combines:

- A "cognitive apprenticeship" approach to both the professional development of teachers and to developing the reading skills of fourth-grade students;
- A reading approach that develops reading-related, meta-cognitive strategies such as questioning before reading, analyzing text structure, the use of graphic organizers, summarization, and self-monitoring of comprehension while reading; and
- More authentic assignments that use and produce informational content on the Internet.

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⁴⁰ Association of College and Research Libraries (ACRL). (2000). *Information Literacy competency standards for higher education*. Chicago: American Library Association. Retrieved June 30, 2005 from <http://www.ala.org/acrl/ilintro.html>.

⁴¹ Gersten, R., Fuchs, L., Williams, J., & Baker, S. (2001). Teaching reading comprehension strategies to students with learning disabilities: A Review of Research. *Review of Educational Research*, 71(2), 279-320.

⁴² Greenleaf, CL, Schoenbach, R., Cziko, C., Mueller, F. (2001). Apprenticing adolescent readers to academic literacy. *Harvard Educational Review*, 71(1), 79-129.

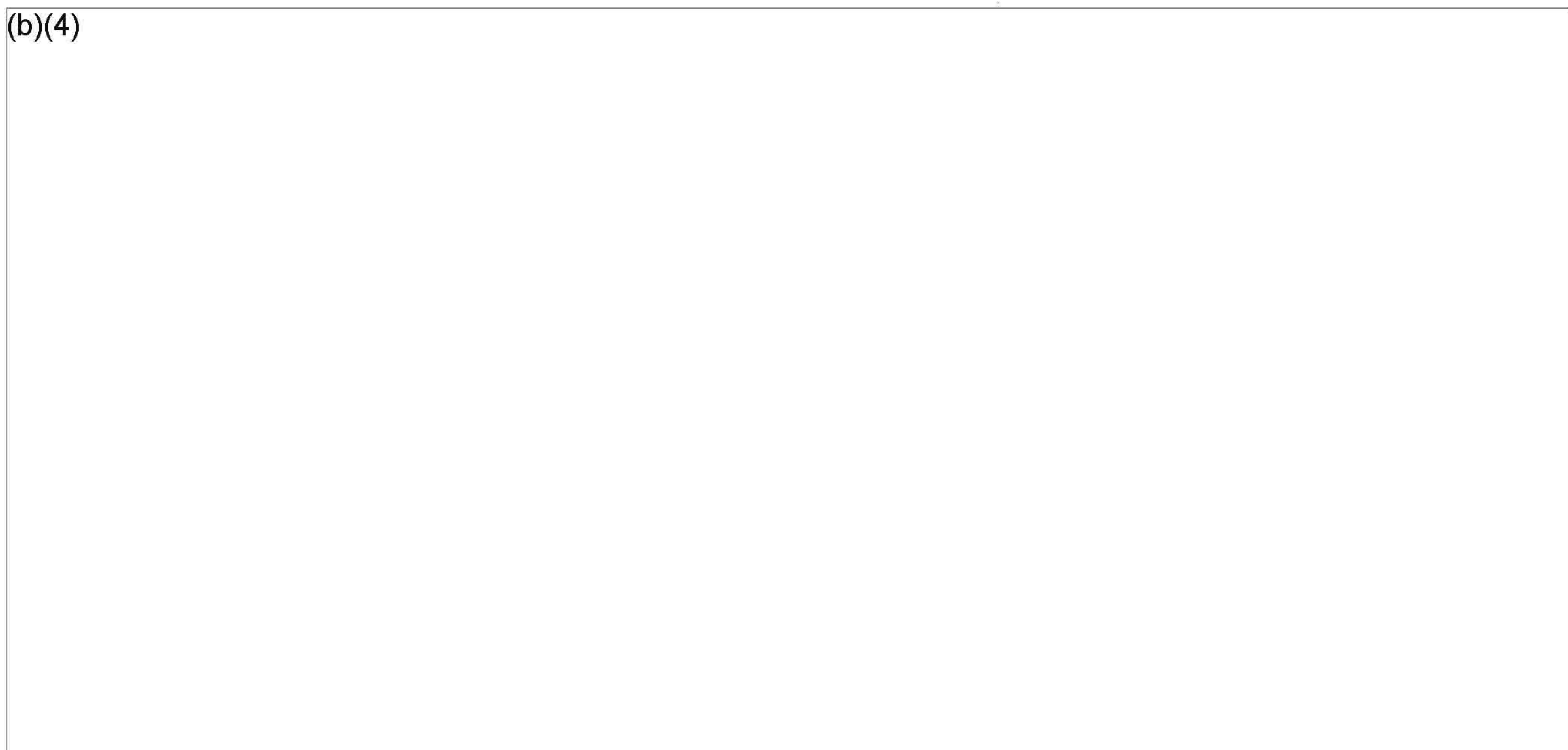
⁴³ Ibid.

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2.2 TECHNICAL WORKING GROUP (TWG)

A very important element of the REL and its effectiveness is the creation of a dynamic and engaged Technical Working Work (TWG) as called for in the RFP. While small in size and resources compared with the rest of the project team, the TWG plays a critical intellectual role in assuring the quality of the work and products of the REL.

The TWG Role

A TWG is commonly part of research and evaluation projects, treated in some cases as token window-dressing for the project staff. Our view is quite to the contrary. We see the TWG as a vital aspect of our work on Task 2 and elsewhere in the project, providing needed expertise and perspective on the major projects of M-CARE. A strong TWG provides the expert review needed during the critical design and analytic phases of research plans and projects, as well as the capacity to review results. An effective TWG works periodically as a group, but also as individuals or small groups to provide expert advice on technical problems that may arise during the course of M-CARE's project work. We plan to use the TWG in both ways. While we have confidence in the high quality of the project team's core staff, we understand the importance of reaching for highly expert external consultants when needed.

The TWG Membership

The RFP calls for the contractor to propose a roster of individual members early in the contract; however, we are advancing a set of recommendations that can be refined subsequent to award. Given the choice provided by ED, we believe it is wiser to operate with a single TWG for all Task 2 studies rather than separate TWGs for each Task 2 study. The objective of finding outstanding talent, particularly methodologists, leads us to propose a single group.

In putting forward our suggestions for a group of manageable size, we have emphasized relevant methodological expertise, supplemented by certain programmatic perspectives. All of those suggested below have agreed to serve should they be later formally asked to do so.

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TWG Processes and Use

The TWG subtask will begin with the development of a draft TWG utilization plan and membership recommendations for ED comment, as specified by the RFP. The plan will lay out general expectations for TWG meetings over the course of the contract. It is our plan to hold two meetings per year – one in person and one electronically. These plans will be more detailed with respect to Year One of the contract, but we would expect to update the plans on an annual basis. We also may not be able to completely foresee all additional assistance that may be sought from TWG members, but we intend to keep ED fully advised of such utilization as the project evolves. We will incorporate ED comments in the plan, when received. We also plan to respond fully to the RFP requirements for TWG agendas in advance of meetings, and minutes submitted afterwards, with ED review and comment in each case.

2.3 – Forms Clearance

The M-CARE staff has extensive experience preparing both Institutional Review Board (IRB) and OMB forms clearance packages for federally sponsored research. After contract award, the steering committee will address the need for both IRB human subjects protection clearance and OMB forms clearance for all Task 1 and Task 2 planned studies.

OMB Forms Clearance – The Office of Management and Budget coordinates all federally sponsored research that imposes any burden on research subjects. We anticipate that OMB clearance will be needed for all Task 2 studies and for those Task 1 studies that involve collecting the same information from more than nine respondents. Recent experience with the OMB Clearance process indicates that the review process takes from 4-6 months and that it is always best to allow for the maximum time. The OMB Justification Statement and the Collection of Information Employing Statistical Methods are the standard forms to be completed for each data collection effort. The Justification Statement requires information as to why the data collection is necessary, how technology will be used to reduce respondent burden, assurance that the proposed data collection does not duplicate other data collection efforts, what will happen if the information is collected less frequently, whether there are questions of a sensitive nature, estimates of burden, time schedule, publications plan and analysis plan. The Collection of Information Employing Statistical Methods form requires information about the respondent universe, sampling procedures, statistical methods and individuals consulted on statistical aspects of the design, among other items. The OMB Package also includes, as attachments, the research questions, the data collection instruments and the authorizing legislation, if appropriate.

Because substantial effort is required to produce an OMB Package, we will coordinate all the clearance requirements at the beginning of each contract year and maximize efficiency by assigning several staff to this effort. Because the information to be provided is standard across all data collection efforts, we will prepare a template to be followed in completing these packages. A coordinated approach to OMB Package preparation should also save time by bundling, where possible, data collection and/or analysis efforts that will utilize the same data sources.

A single OMB Package will be required for each year's new data collection efforts and will be submitted to ED within eight weeks of ED's approval of the annual study plan. ED will circulate the package as required within the agency and also will post an announcement of availability of the package for review and public comment. We will receive ED's comments within five weeks of submission and will revise and re-submit the package, taking into account ED's comments, within four weeks.

IRB Review: All research activities in Task 1 and studies in Task 2 will need to be reviewed by an Institutional Review Board (IRB) to ensure compliance with Public Law 93-579, the Privacy Act of 1974, as amended by the "Buckley Amendment," Family Educational and Privacy Act of 1974; The Freedom of Information Act (5USC 522) and related regulations (Title 34, CFR, Part 97). (b)(4)

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Similar to the procedures described above for preparation of the OMB Package, we will prepare an annual submission for IRB review. All research for M-CARE will be reviewed by Penn State's IRB in the Office of Research Protections. Penn State has an approved federal-wide assurance with the U.S. Department of Health and Human Services. (See Attachment to the Management Plan for additional detail on our anticipated IRB review procedures.)

One of the first activities after contract award will be to prepare the IRB Package, as ED requires notice of IRB approval within four weeks of ED approval of the Task 2 Study Plan. All partner organizations have staff experienced in preparing IRB packages. The study managers for Year 1 approved Task 2 studies and the Task 1.2 lead will develop the materials for their respective studies. We understand that no covered data collection and analysis activities may proceed until IRB approval has been received, and we will allow four months for the entire clearance process.

2.4 – Planning for Data Collection, Site Selection, and Site Visit

As M-CARE staff are preparing the OMB Clearance Package and the IRB Package, they will also develop the data collection instruments, list of sites for the Task 2 studies, and protocols for interviews and focus groups needed to address the study questions. These are all necessary components of both packages and will be prepared as separate deliverables for submission to ED.

Data Collection Instruments: Two Task 2 studies are planned for initiation in Year 1 and either one or two for each of years 2 through 5. Data collection plans will be prepared at the start of each study, with the study manager assuming primary responsibility for this activity. Through our outreach efforts in Task 1.1, we will seek a group of individuals who will agree to pilot test data collection instruments that we develop. This group will consist of students at the grade levels to which the experimental study is directed, teachers of those grades, and, where appropriate, principals or other school administrators. Revisions will be made to the items and procedures as suggested by the pilot test prior to inclusion of the instruments in the OMB or IRB Packages.

Standardized tests or other validated instruments will be used as measures for academic outcomes. We will test for (or report on, in the case of standardized tests) the validity and reliability of these instruments. We will prepare an introduction to the selected instruments that will discuss the rationale for their inclusion, describe the testing procedures, and report on reliability coefficients.

We will submit the draft data collection instruments to ED for review and approval. ED will review the instruments within five weeks of submission and provide comments. We will revise and re-submit the instruments within three weeks of receipt of ED's comments. This schedule will be followed each year for new studies.

List of Participating Sites: For each of the studies beginning in year 1, we will submit a list of sites recommended for participation in the experimental studies. ED will review the lists and provide comments. After approval by ED of the proposed sites, we will notify the sites of their selection, and will submit a final list of participating sites for each experimental study. This procedure and schedule will be repeated in each year for new studies.

Protocols: An important part of planning for data collection is the development of interview and, where appropriate, focus group protocols to be used in visits to the sites. Our protocols will also include procedures for data collection staff to follow from initial site contact to scheduling the visit, to selection of site personnel for interviews, to human subjects protection protocols, such as obtaining signed statements of confidentiality by staff involved in the data collection.

We will develop separate protocols for each of the studies begun in year 1 and for studies initiated in each of the subsequent years of this contract.

2.5 – Data Analysis and Report Preparation

For each Task 2 study we will conduct data analysis consistent with What Works Clearinghouse standards and will prepare both technical and non-technical reports organized around the key study questions. The non-technical report will be geared to practitioners such as those involved in the study. It will present straightforward answers to the study questions based on the findings of the experimental study and will contain a discussion of the implications of the study findings for practice. For policymakers' use we will include an abstract of the study and an executive summary of the findings and their implications.

The technical report will be prepared for IES review and for submission to a peer-reviewed journal. Since M-CARE staff are familiar with the standards for evidence used in reviewing studies by the What Works Clearinghouse, we will share those standards with the study managers and principal investigators for use in preparing the technical reports. The study abstract for the technical report will include a brief description of the study including: the key study question(s), the intervention, the study sample, the key measures and summary of the findings. The executive summary will provide an overview of the study and findings for the study sample and any subgroups for whom effect sizes were calculated.

The technical report will be reviewed by ED within six weeks of submission, and we will revise and re-submit the report to ED within four weeks of receipt of ED's comments. We will prepare the data file for electronic submission, along with the data codebook, in MS Word and in a PDF file.

The non-technical report will be based on the technical report and will, therefore, be submitted within four weeks of submission of the technical report. This report will be written for education practitioners and policymakers and will be drafted in simple, easily understood language. We will request a review of this report by members of our pilot test group prior to submission to ED. ED will deliver comments on this report within four weeks. Based on ED's comments, we will revise and re-submit the

report within three weeks. A second review by ED will be completed within two weeks of receipt. We will subsequently revise the non-technical report, incorporating ED's comments within two weeks.

The monthly progress report, described in Task 5, will contain a section on Task 2 in which we will report activities completed, obstacles and suggested solutions, and plans for next month. The Task 2 leader will be responsible for preparing that section of the monthly report.

**Exhibit 2.3
Proposed Timeline and Schedule**

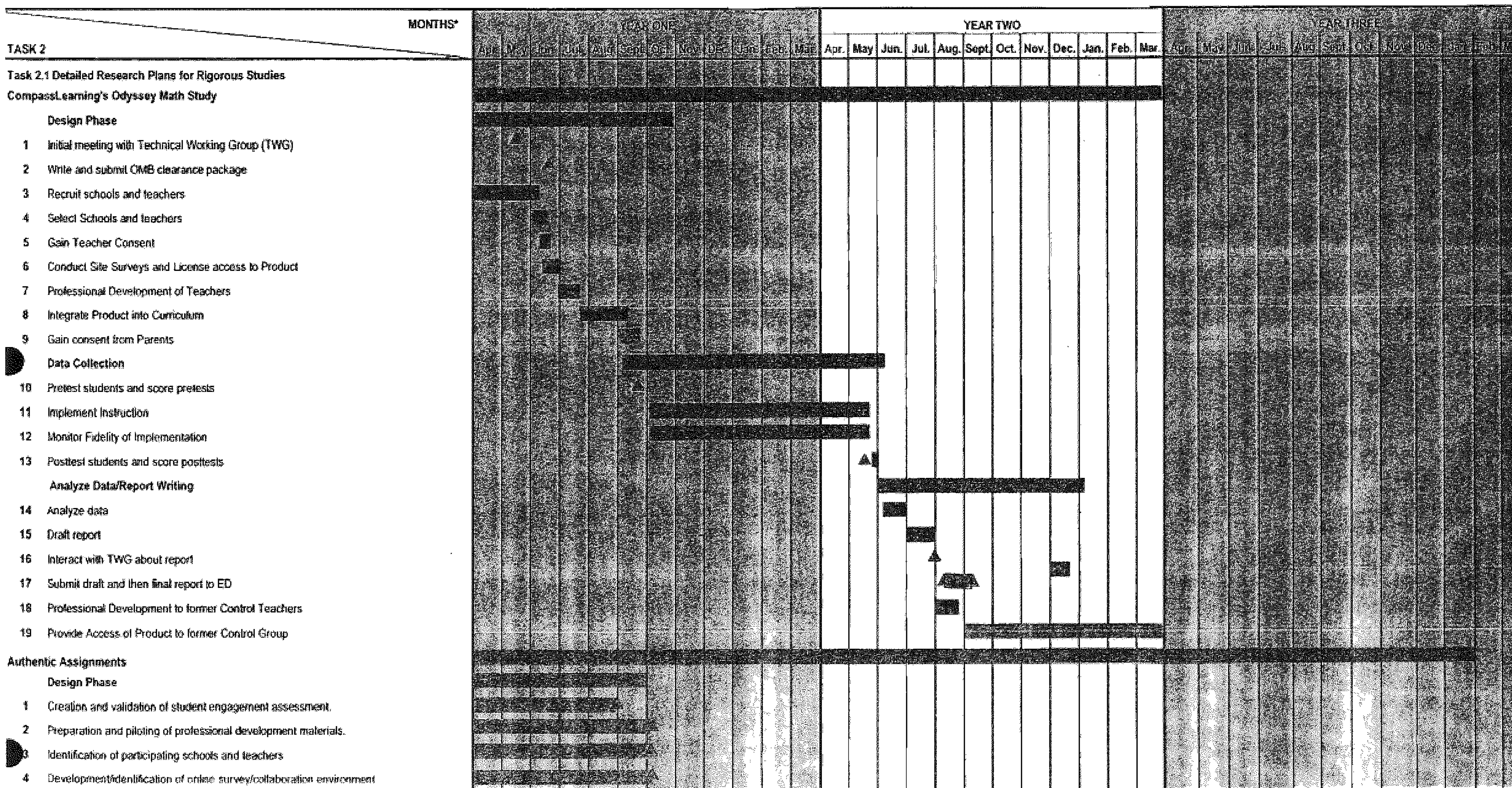
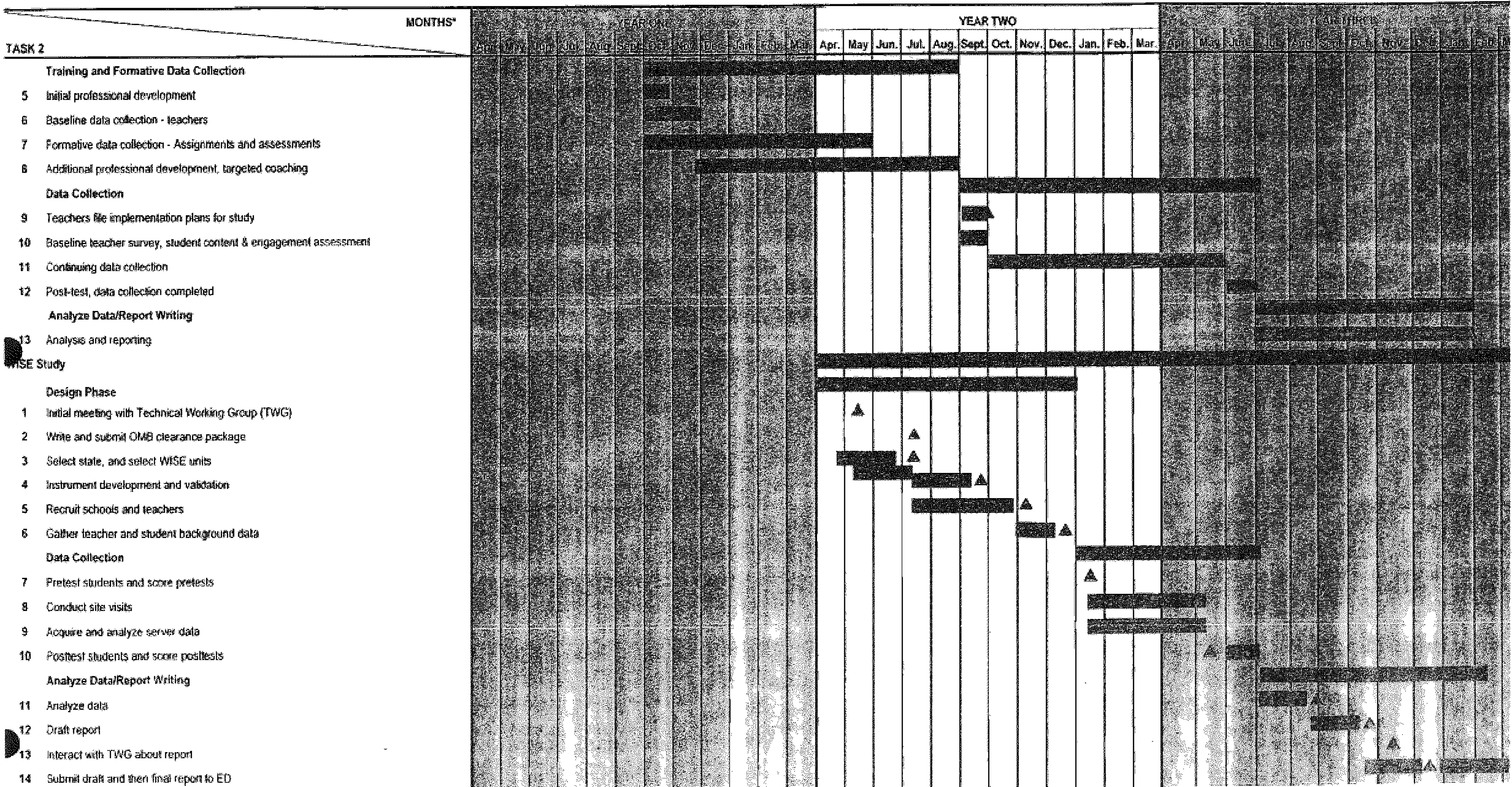


Exhibit 2.3
Proposed Timeline and Schedule

TASK 2	MONTHS*	YEAR FOUR												YEAR FIVE											
		Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
Task 2.1 Detailed Research Plans for Rigorous Studies																									
Compass Learning's Odyssey Math Study																									
Design Phase																									
1	Initial meeting with Technical Working Group (TWG)																								
2	Write and submit OMB clearance package																								
3	Recruit schools and teachers																								
4	Select Schools and teachers																								
5	Gain Teacher Consent																								
6	Conduct Site Surveys and License access to Product																								
7	Professional Development of Teachers																								
8	Integrate Product into Curriculum																								
9	Gain consent from Parents																								
Data Collection																									
10	Pretest students and score pretests																								
11	Implement Instruction																								
12	Monitor Fidelity of Implementation																								
13	Posttest students and score posttests																								
Analyze Data/Report Writing																									
14	Analyze data																								
15	Draft report																								
16	Interact with TWG about report																								
17	Submit draft and then final report to ED																								
18	Professional Development to former Control Teachers																								
19	Provide Access of Product to former Control Group																								
Authentic Assignments																									
Design Phase																									
1	Creation and validation of student engagement assessment																								
2	Preparation and piloting of professional development materials.																								
3	Identification of participating schools and teachers																								
4	Development/identification of online survey/collaboration environment																								

**Exhibit 2.3
Proposed Timeline and Schedule**



**Exhibit 2.3
Proposed Timeline and Schedule**

TASK 2	MONTHS*	YEAR FOUR												YEAR FIVE											
		Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
Training and Formative Data Collection																									
5 Initial professional development																									
6 Baseline data collection - teachers																									
7 Formative data collection - Assignments and assessments																									
8 Additional professional development, targeted coaching																									
Data Collection																									
9 Teachers file implementation plans for study																									
10 Baseline teacher survey, student content & engagement assessment																									
11 Continuing data collection.																									
12 Post-test, data collection completed																									
Analyze Data/Report Writing																									
13 Analysis and reporting																									
WISE Study																									
Design Phase																									
1 Initial meeting with Technical Working Group (TWG)																									
2 Write and submit OMB clearance package																									
3 Select state, and select WISE units																									
4 Instrument development and validation																									
5 Recruit schools and teachers																									
6 Gather teacher and student background data																									
Data Collection																									
7 Pretest students and score pretests																									
8 Conduct site visits																									
9 Acquire and analyze server data																									
10 Posttest students and score posttests																									
Analyze Data/Report Writing																									
11 Analyze data																									
12 Draft report																									
13 Interact with TWG about report																									
14 Submit draft and then final report to ED																									

Exhibit 2.3 Proposed Timeline and Schedule

TASK 2	MONTHS*	YEAR ONE												YEAR TWO												YEAR THREE																	
		Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.						
Concept Mapping																																											
Development of Professional Training on Visualization																																											
1 Metiri and University of Kentucky, Nashville will develop curriculum, lesson designs and professional training program for visualization to increase reading comprehension (7th grade)																																											
2 Pilot curriculum, lesson designs, and professional development with up to five teachers.																																											
Design Phase																																											
3 30 Sites are selected to participate.																																											
4 Regional orientation meetings.																																											
5 Baseline data collection. Metiri TIPs surveys. Readiness of schools is assessed. Capacity building plans are taken where necessary. Visualization proficiency of teachers is																																											
6 30 teachers begin the professional development program, piloting curriculum and lessons with one of their 7th grade classes																																											
7 Researchers develop and validate rubrics and assessments.																																											
8 Visitation by researchers to collect artifacts, ascertain proficiency of teachers																																											
9 Teachers develop lessons for year of research study																																											
10 Baseline data from current 6th graders is collected. Researchers work with schools to randomly select the classes to serve as treatment and control groups.																																											
Data Collection																																											
11 Baseline data on new 7th grade treatment and control classes will be collected.																																											
12 Intervention continues for a full year. Data are collected periodically																																											
13 Site visitations in fall, winter, and spring.																																											
14 Final data collection on teacher practice/proficiency, student reading comprehension, student proficiency with visualization, etc.																																											
Analyze Data/Report Writing																																											
15 Data are analyzed																																											
16 Report Written																																											
17 Report Disseminated																																											
Advancement Via Individual Determination (AVID) Program																																											
Design Phase																																											
1 Identify participating schools, teachers, and students																																											
2 Professional development of participating teachers																																											
3 Curriculum development and refinement																																											

**Exhibit 2.3
Proposed Timeline and Schedule**

TASK 2	MONTHS*	YEAR FOUR												YEAR FIVE											
		Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
Concept Mapping																									
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Researchers develop and validate rubrics and assessments.	7																								
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Teachers develop lessons for year of research study	9																								
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Professional development of participating teachers	2																								
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**Exhibit 2.3
Proposed Timeline and Schedule**

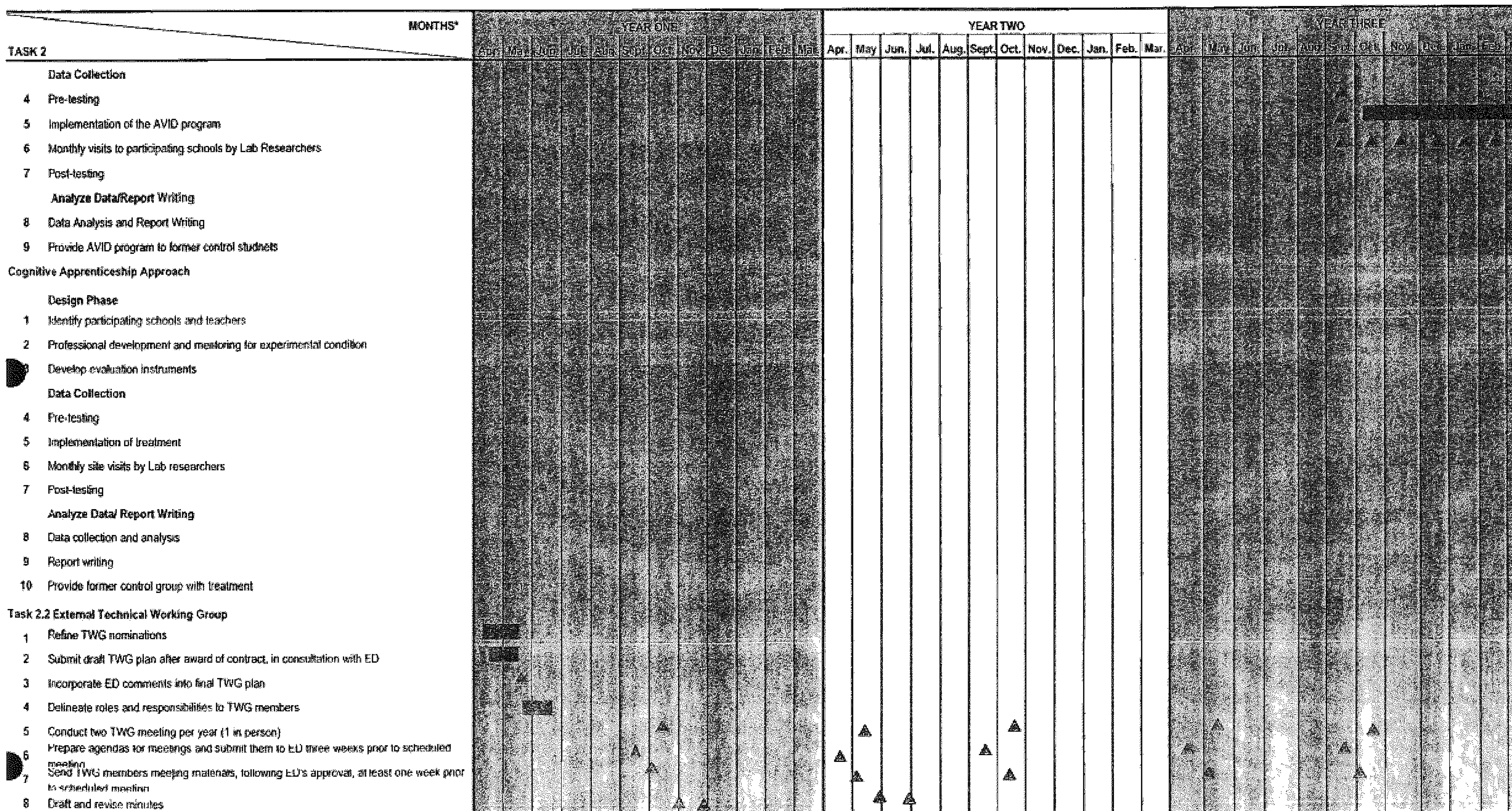
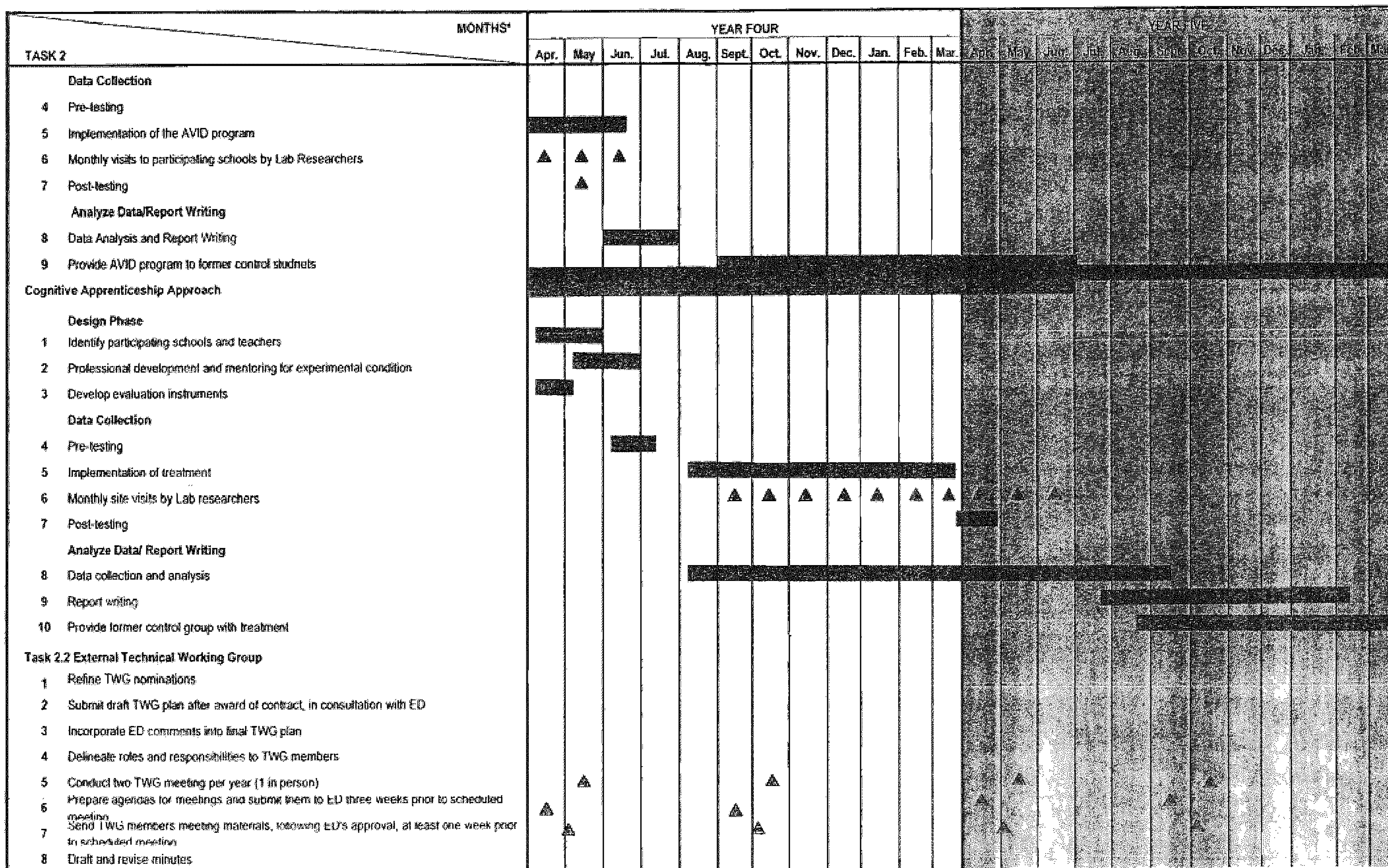
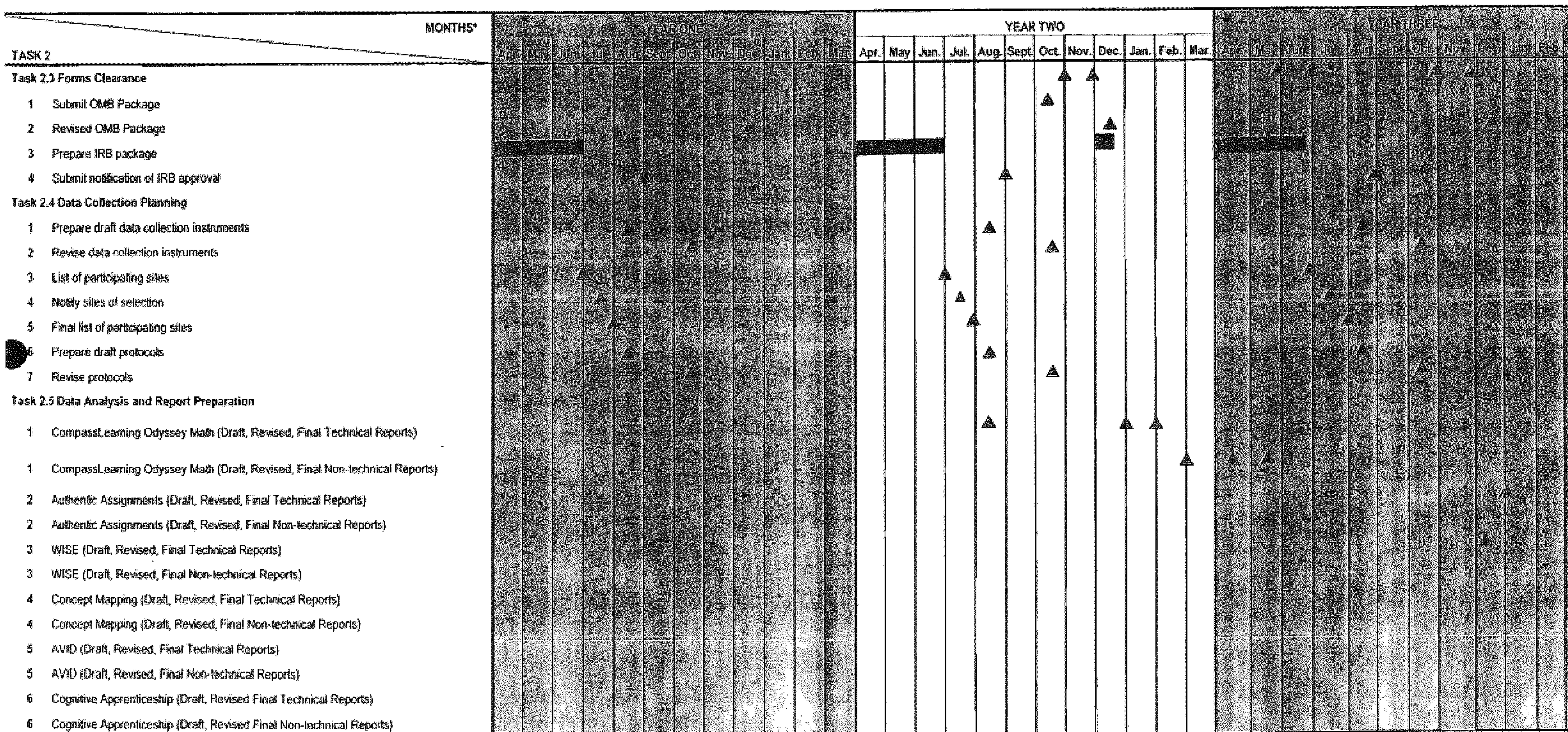


Exhibit 2.3
Proposed Timeline and Schedule



**Exhibit 2.3
Proposed Timeline and Schedule**



* Anticipated start date is April, 2006
 = Deliverable
 = In Progress

**Exhibit 2.3
Proposed Timeline and Schedule**

TASK 2	MONTHS*												YEAR FOUR												YEAR FIVE												
	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	
Task 2.3 Forms Clearance																																					
1 Submit OMB Package																																					
2 Revised OMB Package																																					
3 Prepare IRB package																																					
4 Submit notification of IRB approval																																					
Task 2.4 Data Collection Planning																																					
1 Prepare draft data collection instruments																																					
2 Revise data collection instruments																																					
3 List of participating sites																																					
4 Notify sites of selection																																					
5 Final list of participating sites																																					
6 Prepare draft protocols																																					
7 Revise protocols																																					
Task 2.5 Data Analysis and Report Preparation																																					
1 Compass Learning Odyssey Math (Draft, Revised, Final Technical Reports)																																					
1 Compass Learning Odyssey Math (Draft, Revised, Final Non-technical Reports)																																					
2 Authentic Assignments (Draft, Revised, Final Technical Reports)																																					
2 Authentic Assignments (Draft, Revised, Final Non-technical Reports)																																					
3 WISE (Draft, Revised, Final Technical Reports)																																					
3 WISE (Draft, Revised, Final Non-technical Reports)																																					
4 Concept Mapping (Draft, Revised, Final Technical Reports)																																					
4 Concept Mapping (Draft, Revised, Final Non-technical Reports)																																					
5 AVID (Draft, Revised, Final Technical Reports)																																					
5 AVID (Draft, Revised, Final Non-technical Reports)																																					
6 Cognitive Apprenticeship (Draft, Revised Final Technical Reports)																																					
6 Cognitive Apprenticeship (Draft, Revised Final Non-technical Reports)																																					

* Anticipated start date is April, 2006

▲ = Deliverable
■ = In Progress

Exhibit 2.4 Schedule of Deliverables/Milestones Task 2: Rigorous Applied Research and Development	
Deliverable	Schedule
2.1 Detailed Research Plans for Rigorous Studies	
Revised Detailed Research Plans and Schedules for each Rigorous Study (For Years 1 through 5)	August 1-October 1 every year
Monthly Progress Reports	May 1-May 10, 2006 and every month thereafter through March 2011
Updated Plans for Rigorous Studies	May 1-July 1 every year
2.2 External Technical Working Group	
Draft TWG Plan	April 15, 2006-May 1, 2006
Final TWG Plan	May 1, 2006-May 15, 2006
Draft and Final Agenda	September 15, 2006 October 1, 2006 April 15, 2007 May 1, 2006 Repeated through end of contract.
Draft and Revised Minutes of TWG Meeting	November 1, 2006 December 1, 2006 June 1, 2007 July 1, 2007 Repeated through end of contract.
2.3 Forms Clearance	
Draft OMB Forms Clearance Package	August 15-October 15 every year
Revised OMB Forms Clearance Package	October 15-December 15 every year
Documentation of IRB Approvals	April 1-September 1 every year
Preparation of Privacy Act System of Records Notice (If required)	August 1, 2006-September 1, 2006
2.4 Planning for Data Collection, Site Selection, and Site Visit	
Draft Data Collection Instruments	May 15-August 15 every year
Revised Data Collection Instruments	August 15-October 15 every year
Proposed List of Sites with Explanation	May 1-July 1 every year
Final list of Participating sites	July 1-August 1 every year
Draft Protocols	June 15-August 15 every year
Revised Protocols	August 15-October 15 every year
2.5 Data Analysis and Report Preparation	
Compass Learning	
Draft Technical Report	June 15, 2006-August 15, 2006
Revised Technical Report	October 1, 2006-December 1, 2006
Final Technical Report	December 1, 2006-January 1, 2007

Exhibit 2.4 (Cont.) Schedule of Deliverables/Milestones Task 2: Rigorous Applied Research and Development	
Deliverable	Schedule
Draft Non-Technical Report	February 1, 2007-March 1, 2007
Revised Non-Technical Report	March 1, 2007-April 15, 2007
Final Non-Technical Report	May 1, 2007-May 15, 2007
Authentic Assignments	
Draft Technical Report(s)	November 1, 2006-January 1, 2007
Revised Technical Report(s)	February 15, 2007-April 15, 2007
Final Technical Report(s)	April 15, 2007-May 15, 2007
Draft Non-Technical Report(s)	June 15, 2007-July 15, 2007
Revised Non-Technical Report(s)	July 15, 2007-September 1, 2007
Final Non-Technical Report(s)	September 15, 2007-October 1, 2007
WISE	
Draft Technical Report(s)	October 15, 2007-December 15, 2007
Revised Technical Report(s)	February 1, 2008-April 1, 2008
Final Technical Report(s)	April 1, 2008-May 1, 2008
Draft Non-Technical Report(s)	June 1, 2008-July 1, 2008
Revised Non-Technical Report(s)	July 1, 2008-August 15, 2008
Final Non-Technical Report(s)	September 1, 2008-September 15, 2008
Concept Mapping	
Draft Technical Report(s)	August 15, 2010-October 15, 2010
Revised Technical Report(s)	December 1, 2010-February 1, 2011
Final Technical Report	February 1, 2011-March 1, 2011
Draft Non-Technical Report(s)	October 15, 2010-November 15, 2010
Revised Non-Technical Report(s)	January 1, 2011-February 15, 2011
Final Non-Technical Report(s)	March 15, 2011-March 31, 2011
AVID	
Draft Technical Report(s)	June 1, 2009-August 1, 2009
Revised Technical Report(s)	September 15, 2009-November 15, 2009
Final Technical Report	November 15, 2009-December 15, 2009
Draft Non-Technical Report(s)	January 15, 2009-February 15, 2010
Revised Non-Technical Report(s)	February 15, 2010-April 1, 2010
Final Non-Technical Report(s)	April 15, 2010-May 1, 2010

Exhibit 2.4 (Cont.)
Schedule of Deliverables/Milestones
Task 2: Rigorous Applied Research and Development

Deliverable	Schedule
Cognitive Apprentice	
Draft Technical Report(s)	May 15, 2010-July 15, 2010
Revised Technical Report(s)	September 1, 2010-November 1, 2010
Final Technical Report	November 1, 2010-December 1, 2010
Draft Non-Technical Report(s)	December 15, 2010-January 15, 2011
Revised Non-Technical Report(s)	January 15, 2011-March 1, 2011
Final Non-Technical Report(s)	March 15, 2011-March 31, 2011

Task 3: National Laboratory Network

Author: (b)(6)

Key Staff: (b)(6)

Deliverables: Monthly Reports

The National Laboratory Network (NLN) provides the means for each REL to coordinate efforts that maximize resources in development and electronic dissemination of research-based products for knowledge- and capacity-building and for training and technical assistance (TTA). As a new REL, M-CARE will develop its own strategic plan detailing its contributions to shared production and use of REL resources. Then, through enhanced collaboration with other RELs and NLN, M-CARE will participate in the preparation of the annual NLN plan. In the following sections, we highlight our understanding of the current REL Network and the new vision articulated by ED for the NLN, as well as our plan for participation in NLN collaborative activities. We conclude with reporting requirements.

1. Understanding the RELs and the Network

In 1965, the U.S. Department of Education (ED) established the Regional Education Laboratory (REL) program to improve educational services. While the goals of the REL program have evolved over the last 40 years, the general mission is to support education initiatives at all grade levels in States, school districts, and schools within a designated geographic region. In the last five years, RELs, primarily working at the regional level, have been charged with creating evidence-based knowledge and practices, disseminating and promoting the utilization of the research and practices, and supporting school improvement efforts to increase the academic achievement of students (e.g., professional development, program evaluation).

Each REL participates in an REL Network Web site that was created “to ensure that those involved in educational improvement at the local, State, and regional levels have access to the best available information from research and practice”. As now configured, the REL Network Web site serves as a single point of access to individual REL Web sites and provides links to products, reports, and other ED resources (<http://www.relnetwork.org/about.html>).¹

It is the understanding of M-CARE that ED has a new vision for a second-generation National Regional Education Laboratory Network (NLN) that calls for innovative thinking about how the research conducted by each REL is coordinated to increase collaboration and decrease duplication, and how research products are disseminated and synthesized into meaningful information to sustain evidence-based teaching and learning practices that have widespread applicability. Most important, at the core of the new vision is the need to build the capacity of the RELs and their consumers (e.g., state education agencies, educational professionals at all levels) to accumulate knowledge systematically in order to facilitate school improvement efforts and increase student achievement.

ED’s vision reflects the influence that RELs, as a unified, and coordinated entity, can have in the creation, dissemination, and use of the research to grow a knowledge base of evidence-based teaching and learning strategies. Maximizing the collective strength of the RELs will encourage and support the cross-fertilization of the research, ideas, knowledge, and activities that emerge from each REL while

¹ On the Web site homepage is a regional map of the U.S. that allows the user to click on individual regions and find contact information for a designated Lab along with a link to its individually operated Web site.

reducing duplication of effort.² To build the capacity of RELs and all those in the education community, the second generation NLN must be able to provide a new level of support for strengthening the RELs' infrastructures for implementing, disseminating, and sustaining evidence-based programs.

Our shared vision of the second-generation NLN involves coordinating the efforts of the 10 RELs and thinking strategically about ways to get important educational research findings into the hands of consumers (e.g., teachers, school districts, state education agencies). It focuses on marketing the products developed by each of the RELs to a national market and transforming the REL Network from being a source of products to one that creates audience-appropriate materials on important research, enables consumers to apply best practices for instruction to improve student achievement.

2. Purposes of the NLN

M-CARE will participate as one of the 10 RELs in the NLN. We are committed to the vision of the NLN and welcome opportunities to collaborate on research agendas. Moreover, M-CARE will use all available mechanisms to coordinate its activities through the NLN, including meetings, listservs, joint bulletins and newsletters. As requested, we will electronically disseminate our research findings and products through NLN's Web site.

M-CARE will work with other RELs to identify opportunities for joint research (both fast response and rigorous) and TTA activities. While it is important that M-CARE meet the needs of the Mid-Atlantic Region, it is crucial to coordinate with the other RELs to avoid unnecessary duplication of effort. M-CARE will follow the NLN plan in coordinating activities with NLN partners.

While each REL will be responsible for disseminating products regionally (see Task 4), it is important that the RELs work together to disseminate products nationally. This includes synthesizing information into audience-appropriate products.³ In sum, M-CARE will participate fully, working closely with the coordinating contractor as it develops an overall strategic plan, and in the continuous implementation of that plan. We will actively contribute, where appropriate, to the planning of the structure and infrastructure for the NLN Web site and the NLN intranet site.⁴

3. M-CARE's Commitment to NLN Five-Year Plan

From contract award, M-CARE will participate in a strategic planning process with the NLN coordinator contractor to build strong partnerships with the other REL partners, to discover and plan for differing interests and values, to ensure that smart decisions are made by the Network, to promote successful collaboration with the other RELs, and to remain accountable to NLN. To attain these goals, M-CARE will work with the coordinating contractor by contributing to the development of the NLN Five-Year Plan. We anticipate this plan, at a minimum, will outline strategies and process for:

² We note that "geographic regions" designate appropriate boundaries for face-to-face technical assistance but not necessarily for constraining the applicability of particular research findings or products and strategies.

³ For instance, M-CARE will carry out broad-based, national dissemination of scientifically valid research findings and reporting on rural areas.

⁴ M-CARE will not have an individual Web site but will be part of the REL Network's one common Web site as the one electronic dissemination point for all 10 laboratories. This Web site will be planned, designed, and updated by the coordinating contractor.

- Identifying and promoting cross-lab collaboration on fast response applied research and development projects and on rigorous studies;
- Disseminating scientifically valid research findings to a national audience; and
- Carrying out joint training and technical assistance activities.

As the Task 1 and Task 2 plans for RELs are reviewed, both complementary and overlapping studies and efforts will be identified. M-CARE's individual plan will designate activities and studies specific to our Lab and those that are cross-cutting. Those identified as cross-cutting also will be included in our monthly reporting to NLN.

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⁵ M-CARE also will provide for dissemination of successful educational programs and best practices that may have been developed or used by others within the Mid-Atlantic region nationally through the NLN.

Exhibit III-3.2
Schedule of Deliverables/Milestones
Task 3: National Laboratory Network

Deliverable	Due Date
Monthly Progress Reports	May 1-May 10, 2006 and every month thereafter through March 2011

Task 4: Regional Dissemination

Author: (b)(6)

Key Staff: (b)(6)

Deliverables: Revised Dissemination System Plan, 12 weeks; Dissemination System Plan, 17 weeks; Status Report on Dissemination Activities, July 1 each year; Revised Products Plan for Year 1; Updated Products Plan for Years 2-5; Electronic File to ERIC – all Reports; Monthly Progress Reports.

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- Create a community of learners among education professionals to sustain an environment of high academic standards for all students
- Support consumers' capacity-building efforts to improve educational outcomes for students of all ages and ability levels
- Coordinate the people, organizations, processes, and technologies necessary to meet the needs of states, schools, districts, policymakers, researchers, and the public
- Be a regional resource for States; urban, suburban, and rural school districts; public and private schools; teachers; researchers; policymakers; and the public.

Leveraging Lessons Learned

Based on our work in knowledge management and research,¹ we have learned many lessons.

- We must encourage dynamic, collaborative, and ongoing sharing and use of knowledge and information. As knowledge is used, new knowledge is created and applied in a cumulative, iterative fashion.
- To be a strong, successful regional Lab, we will have to build partnerships with our consumers, SEAs, LEAs, and education professionals, to obtain their input, and learn about and disseminate information on their most challenging issues. By addressing these challenges, we

¹ Hood, P. (2002). Perspectives on knowledge utilization in education. San Francisco, CA: WestEd; National Center for the Dissemination of Disability Research (2001). General orientation to new knowledge utilization fields of informatics, knowledge management and information technology. Austin, TX: Southwest Educational Development Laboratory; Petrides, L., & Guiney, S. Z. (2002). Knowledge management for school leaders: An ecological framework for thinking schools. *Teacher's College Record*, 104(8), 1702-1717; Petrides, L., & Nodine, T. (2003). Knowledge management in education: Defining the landscape. Half Moon Bay, CA: Institute for the Study of Knowledge Management in Education; Kohlmoos, J (2005). *Toward more effective approaches to knowledge use in education*. Washington, D.C.: National Education Knowledge Industry Association.

will create mechanisms for sharing among our consumers that will help increase the capacity of the field to build and sustain effective school improvement practices.

- To encourage the use of the knowledge and research created by M-CARE, we must meet consumers' needs at their stage of awareness and level of experience with school improvement strategies.
- Those who work with different student populations (i.e., rural/urban/suburban, English language learners, special education population, poverty status, ethnic diversity, student mobility, high school, public/private/charter status) have different information needs and require different dissemination strategies.
- To have a sustainable impact on schools and student achievement, all research should include implications and strategies for integration into the instructional component and have the commitment and leadership of school administrators. We must be prepared to provide schools with professional support through teacher and administrator professional development.

1. DESIGN DISSEMINATION SYSTEM

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2. RELEVANCE OF INFORMATION

Through our experience, we are keenly aware that many consumers do not know about sources for evidence-based research, or do not want to read it because it has little practical information. All of our products and TTA activities will consider the needs of adult learners. Adults are more motivated to seek a learning experience if they perceive that the experience is directly related to a current life event or challenge. They also need to be self-directed. This means that the content of products and TTA should focus heavily on the application of presented concepts to relevant problems. It also means that, to the extent possible, all products and activities should be infused with "how-to" information and opportunities to engage consumers in mutual inquiry. To enhance learning for adult populations, information should be delivered through case studies, problem-solving groups, and participatory activities. An opportunity for the immediate application of new knowledge is also important. For adult learners, integration of new knowledge and skill requires transition time and focused effort on its application. Therefore, it is important to provide a means for continued learning, reinforcement of new learning, and relevant application of learning.

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2.1 Dissemination of Research-based Reports

The M-CARE team commits to disseminating the research of the National Lab Network to support regional school improvement efforts. We will post reports, policy briefs, abstracts, and summaries in collaboration with the NLN. In addition, we will produce a portfolio of educational products and TTA modules tools that conform to the ED's expectations for the review and distribution of research in all formats. To increase access to our products, we will submit all documents to ERIC, as well as to the NLN, all regional comprehensive centers, and all ED-supported research and technical assistance centers.

As part of the annual plan described in Task 5.1, we will include our revised product plan, based on discussions held at the initial meeting for this contract. Annually thereafter, we will update the plan with a revised product list.

Exhibit III-4.4 contains the Task 4 timeline and Exhibit III-4.5 contains the Task 4 schedule.

Exhibit III-4.4
Proposed Timeline and Schedule
Task 3: National Laboratory Network

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Task 5: Planning, Management, and Reporting

Author: (b)(4)	
Key Staff: (b)(6)	
(b)(6)	
Deliverables: Updated Annual Plan by July 1 each year; report on forming Governing Board, By-laws, and members within 8 weeks; Board meeting within 12 weeks; report on each Governing Board meeting, including minutes and actions – after each meeting.	

Our approach to both internal and external management for the Mid-Atlantic Collaborative for Applied Research in Education (M-CARE) involves establishing and supporting a regional governing board and a steering committee to bring about a fully coordinated work effort. We describe our procedures for project management, including project organization, communication protocols and schedules, and project timelines. Finally, we present our understanding of, and procedures for, ensuring that all reporting requirements are met. (b)(4)

Subtask 5.1 – Update Annual Plan

Each year, on or before July 1, we will update the annual plan for operating M-CARE. The update will focus on the coming year and will include a fully revised technical plan with task activities, schedules, and budgets. The plan will be based on lessons learned in the previous year as well as the five-year plan contained in the proposal. We will consult with our TWG and the Governing Board on priorities, schedules and recommended changes.

The first section of the annual plan will include a summary of activities and progress on all tasks, and for fast response studies and rigorous research studies, lessons learned in the preceding year and implications for the next year. Additionally, any changes in scope of work or timelines to which ED has agreed during the past year will be documented in this section. The next section will provide a summary of funds expended by major activity, including a breakdown of expenses for rural areas and the use of small business subcontractors and consultants. In the third section, we will supply a list and brief description of products and publications developed in the past year. The final section will contain the next year's plan for the Lab, with, at a minimum, the following information:

- List and description of activities, especially those related to Task 1 training and technical assistance and fast response studies and Task 2 research
- Matrix of activities and timelines submitted with the preceding year's plan, annotated to designate the status of each activity
- Matrix of activities and timelines for the coming year, displaying the deliverables and products, the key personnel, and timeframe for each activity
- Updated project organization chart showing key personnel for each major task and activity
- Time commitments to the Lab for each key person
- Technical approach to accomplishing each new activity and task

- Budget by task and anticipated expenditures for rural areas and small business subcontractors and consultants, noting any changes from the proposal budget and rationale for each change.

Two copies of the updated annual plan will be submitted to the Contracting Officer's Representative (COR), and one copy will be submitted to the Contracting Specialist (CS).

Subtask 5.2 – Form and Maintain a Governing Board

The authorizing legislation (Education Sciences Reform Act of 2002) delineates the functions, duties, and composition of a governing board for each of the 10 regional labs. The governing board is to be representative in terms of States in the region, needs of regional constituencies, and technical expertise. Composition of the board is to include the Chief State School Officer or designee for each State in the region, nominees of the constituent governors, and State organizations of superintendents, principals, institutions of higher education, teachers, parents, businesses, and researchers. [Section 174 (h)]

Eight weeks after the start of this contract we will submit a list of governing board members to ED. Each Chief State School Officer will be offered the opportunity to serve or to appoint a representative of the State agency. We will review the membership of the previous REL governing board and will consult leaders in the education community on their efficacy as board members. In drawing up a list of candidates, we will solicit names from leaders in each State in the region and will attempt to achieve the broadest possible representation in selecting parents, teachers, and business representatives. Additionally, we will seek members from institutions of higher education in the region other than those participating in the proposed lab. Criteria for selection will include: State representation, urban and rural representation, history of involvement in school reform, and record of public service, as well as expertise in research in educational settings.

The Governing Board serves the following functions: guides and directs the lab in carrying out the legislative provisions; sets the regional agenda of the lab; maintains dialogue with the Evaluation and Regional Assistance Commissioner (ERAC) concerning the lab's goals, priorities and activities; establishes the mission of the lab for the contract in consultation with the ERAC; ensures that all lab products are high quality; establishes standards for governance, organization, management, and administration and quality of staff; directs the lab to carry out activities so that they attain States' education goals; conducts an ongoing survey of educational needs in the regions; and allocates the lab resources to and within each constituent State. [Section 174 (h)]

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The governing board will be asked to submit a plan, including resource allocation within and across States in the region, to carry out its multiple functions. The Lab staff will supply the board with pertinent information gathered in preparation of the proposal, such as state-level needs assessments and the needs assessment conducted for the Comprehensive Centers by the Regional Advisory Committees and will subsequently update that information based on the most current academic and behavioral data. It will draw up by-laws or revise, as necessary, by-laws used by the preceding lab. M-CARE staff will review the plan

and the by-laws to ensure that they meet the requirements of the legislation. Our internal steering committee will be responsible for communications with the governing board and for reviewing its products and activities. Lab staff will be guided by the steering committee to ensure lab activities comply with the language and spirit of the legislation.

Within 12 weeks of contract initiation we will submit to ED a report on the governing board, including member roster with affiliation, by-laws, plans, and date and agenda for the first board meeting. That meeting will be held by the 12th week from contract award and will be attended by all board members and key staff of the lab. Lab staff will document the discussion and results of the board meeting and will prepare minutes with action items. Two copies of the board report and minutes of the first board meeting will be distributed to the COR and a single copy to the CS.

Subtask 5.3 – Develop Standards and Indicators and Prepare Reports for ED Performance Monitoring

With many tasks and studies being implemented concurrently throughout this contract, it is important to utilize a standard set of performance metrics, in addition to the management oversight provided by key personnel, to ensure that all work is conducted effectively and in compliance with ED standards. Caliber staff's knowledge of the scientifically valid research procedures and standards employed by the What Works Clearinghouse will be useful in developing a set of standards for monitoring the work under Tasks 1 and 2. For Task 2 studies, the following standards are potential examples:

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Subtask 5.4 – Schedule and Attend Meetings with ED

M-CARE views ED as a partner in defining and reviewing the work of the Lab. Ongoing communication between the key staff of the Lab and ED will be important to ensuring that the work and products are on track and of high quality. We will foster communication using a variety of media and

venues, including in-person meetings, telephone, Web cast and electronic mail. Meetings will generally take place at ED but on occasion may be held at Caliber's Fairfax, VA, headquarters.

On a quarterly basis, we will schedule meetings with ED to discuss progress, challenges and potential solutions. The annual meeting to discuss the updated project plan with ED will serve as one of these meetings. (The biannual meetings [Subtask 5.5] will not substitute for these meetings, as those meetings will be concerned with all 10 regional labs.) Other meetings will be either face-to-face or by telephone, as appropriate. In addition, we will schedule meetings with ED around key deliverables as discussed in preceding tasks. For each meeting we will designate a note taker. Within two weeks after a meeting, we will provide ED with a memorandum summarizing the meeting discussion, decisions made, and action items.

Within two weeks of contract award, key personnel on this contract will meet with ED's COR, CS and contracting officer (CO) in Washington, DC. The results of this startup meeting will be documented, including action items for follow-up. Each year thereafter, the key staff of the Lab will come to Washington, DC, for a meeting on the annual plan.

Subtask 5.5 – Schedule and Attend Biannual Meetings

Twice each year, throughout the contract period, all Lab directors and representatives of their governing boards will attend a meeting at ED to discuss progress and issues arising over the previous six months. M-CARE will develop two sets of items for the meeting agenda – one that encompasses cross-cutting issues and a second set that is specific to our lab. We will supply ED with a list of those items two weeks in advance of the meeting. One of the staff attending the meeting will be designated as a notetaker. Two weeks following the meeting, we will provide a summary of the biannual meeting with a list of action items and recommendations from the governing board to the COR. This memorandum will serve as a follow-up list for future communications with ED.

Subtask 5.6 – Prepare Monthly Progress Reports

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This report will contain information on progress, issues, and proposed solutions, as well as milestones achieved, products and other deliverables prepared during the month, and staff utilization by task. The narrative will discuss progress, deliverables, significant problems, if any, and suggested resolution for each of the five tasks. In the event that there are no deviations in scope, budget, or schedule from the management plan described in subtask 5.1, we will affirmatively state that fact. Additionally, for each task, we will detail the plans for the following month. The monthly progress report will be delivered electronically to the COR and CS.

Subtask 5.7 – Prepare Monthly Financial Reports

Caliber also will prepare a monthly financial report to accompany the progress reports for submission to ED within 10 working days from the end of the preceding month. This report will display the

total dollars available at the beginning of the month, dollars expended that month by category, and total dollars remaining at the end of the month. We will provide detailed financial information in the following categories:

- Salaries listed line by line for each staff member along with percent of their time used that month and dollar amount
- Total fringe benefits expended for all staff
- Consultant services listed on a line-by-line basis for each consultant by name, daily rate, number of days billed that month, and amount
- Line-by-line listing of each subcontractor and total amount billed that month
- Staff travel listed for each staff member by name, destination, purpose, number of days, and amount
- Consultant travel listed for each consultant by name, destination, purpose, number of days, and amount
- Meetings and Conferences – nontravel costs
- Publications and Printing (electronic and print) listed by product name, number of copies, and amount
- Communications – telephone and other – total amount
- General Supplies – total amount
- Other direct costs, such as data processing, miscellaneous – total amount
- Indirect costs – total amount
- Fee, if applicable
- Expenditures for rural areas
- Additional categories not included above.

We will set up a template for displaying the financial information and submit to ED for review in advance of preparing the first monthly financial report. Additional information requested by ED will be incorporated into the next month's financial report. Two copies of this report will be provided to the COR and one to the CO.

Subtask 5.8 – Cooperate with Year 3 Evaluation

As directed in the authorizing legislation [Section 174 (j)], ED will provide an independent evaluation of the Regional Education Labs. These results will be submitted to Congress and to the

governing boards. ED will conduct this evaluation during the third year of the contract. M-CARE staff and governing board will cooperate with ED and with other labs in requests for data, information, and products. We also will grant interviews and complete surveys or other efforts by ED/contractor to gather information for the evaluation.

Subtask 5.9 – Prepare Final Report

The staff of M-CARE will work with ED to prepare a final report that appropriately reflects the accomplishments, products, benefits, and challenges of the lab during the five-year period. We will prepare an outline containing a listing of the accomplishments, products, benefits, and challenges in advance of preparing the draft report for review by ED. Based on the guidance received from ED's comments on this outline, we will prepare a draft report for submission to the COR within 16 weeks of the end of this contract. ED will provide comments on the draft report within four weeks, and we will revise the draft report as appropriate. The final report will be submitted electronically in MS Word and in five hard copies to the COR and one to the CO on the last day of the contract.

Exhibit III-5.1 displays the timeline for the deliverables and activities of Task 5. Following that, Exhibit III-5.2 contains the task 5 schedule.

EXHIBIT III-5.1

PROPOSED TIMELINE AND SCHEDULE

MONTHS*	A	M	J	J	A	S	O	N	D	J	J	A	S	O	N	D	J	F	M					
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Task 5: Planning, Management and Reporting																								
5.1 Update Annual Plan				▲	▲											▲	▲							
5.2 Form and Maintain a Governing Board			○	▲											○	▲								
5.3 Develop Standards and Indicators and Prepare Reports			●	●	●	▲		●							●		●	▲						●
5.4 Schedule and Attend Meetings with ED	○	▲											○	▲										
5.5 Schedule and Attend Biannual Meetings										○	▲					○	▲						○	▲
5.6 Prepare Monthly Progress Reports	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
5.7 Prepare Monthly Financial Reports	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
5.8 Cooperate with Year 3 Evaluation	—————																							
5.9 Prepare Final Report																								

* Anticipated start date is April 2006

- ▲ = Deliverable
- = In progress
- = Meeting
- = Quarterly review

EXHIBIT III-5.1(Cont.)																																					
PROPOSED TIMELINE AND SCHEDULE																																					
	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	
Cont.	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	
5.1				▲																							▲										
5.2			○	▲											○	▲											○	▲									
5.3							●	▲										●	▲																		
5.4																																					
5.5																																					
5.6																																					
5.7																																					
5.8																																					
5.9																																					

* Anticipated start date is April 2006

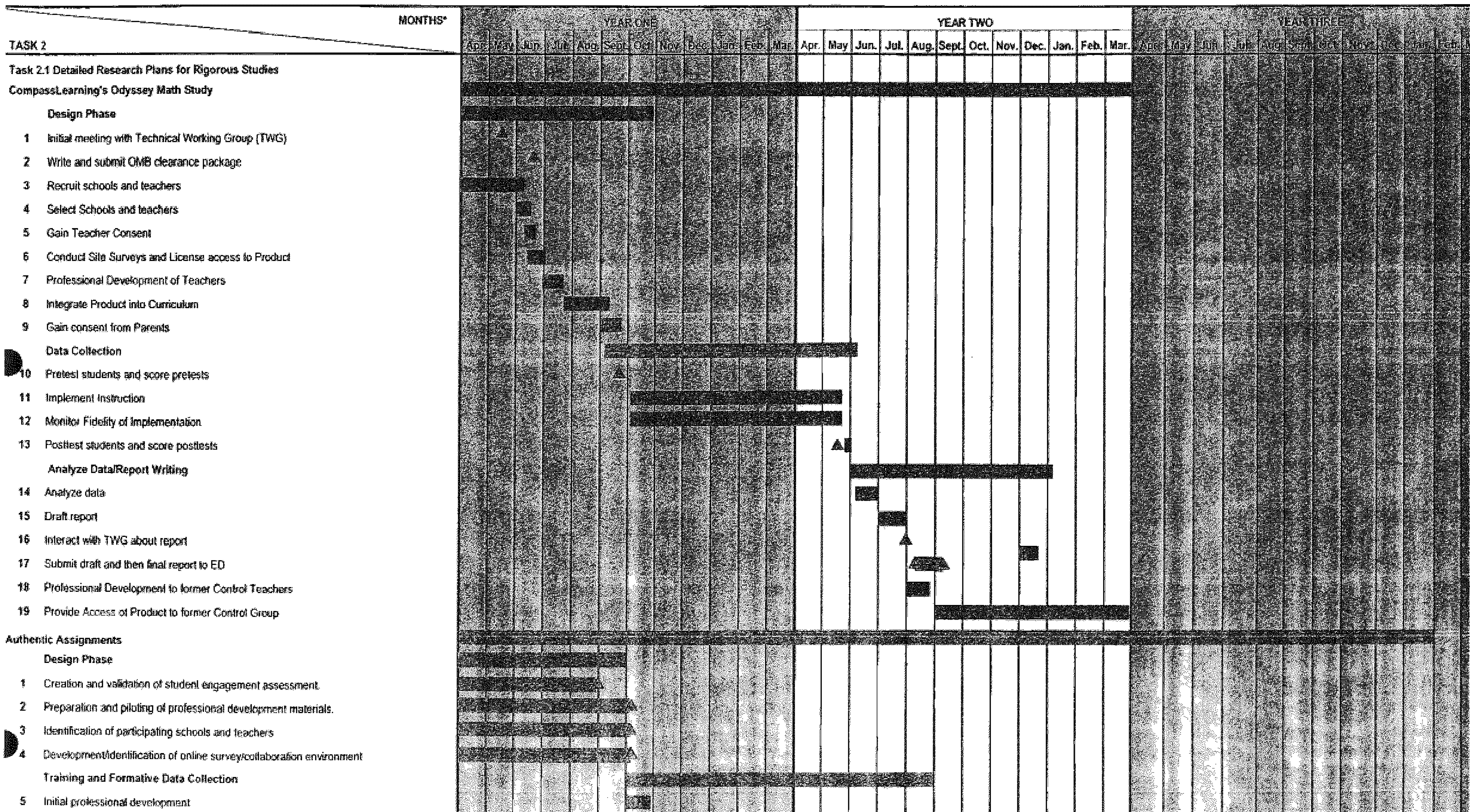
- ▲ = Deliverable
- = In progress
- = Meeting
- = Quarterly review

Exhibit III-5.2
Schedule of Deliverables/Milestones
Task 5: Planning, Management and Reporting

Deliverable	Due Date
5.1 Updated Annual Plan	
Updated Annual Plan	July 1, 2006 and every year thereafter
5.2 Formation and Functions of Governing Board	
Report on Forming Governing Board, By-Laws, and Members	May 15-June 15, 2006
Board Meeting	July 15, 2006 and January 15, 2007, and every year thereafter
Report on Each Governing Board Meeting, including minutes and actions	July 15, 2006-August 1, 2006 and January 15, 2007-February 1, 2007, and every year thereafter
5.3 ED Performance Monitoring	
Annual Performance Indicators Report	August 1, 2006-September 1, 2006 and every year thereafter
Additional Performance Data (If requested by ED)	Upon ED request
5.4 Meetings with ED	
Initial Meeting with ED	April 1, 2006-April 15, 2006 and every year thereafter
Other Meetings with ED	To be determined by ED
Meeting Summary Memos	April 15, 2006-May 1, 2006 and every year thereafter
5.5 Biannual Meetings	
Biannual Meetings	July 1, 2006 and January 1, 2007 and every year thereafter
Issues Memos/Summaries	July 1-15, 2006 and January 1-15, 2007 and every year thereafter
5.6 Monthly Progress Reports	
Monthly Progress Reports by Task	May 1-May 10, 2006 and every month thereafter through March 2011
5.7 Monthly Financial Reports	
Monthly Financial Reports	May 1-May 10, 2006 and every month thereafter through March 2011
5.8 Year 3 Evaluation	
Information as requested by ED	As requested by ED beginning in Year 3
5.9 Final Report	
Draft Report	September 15, 2010-December 15, 2010
Revised Final Report with an Electronic File	January 15, 2011-March 15, 2011

COMBINED TIMELINE AND SCHEDULE

**Exhibit 2.3
Proposed Timeline and Schedule**



Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this report.

**Exhibit 2.3
Proposed Timeline and Schedule**

TASK 2	MONTHS*	YEAR FOUR												YEAR FIVE											
		Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
Task 2.1 Detailed Research Plans for Rigorous Studies																									
CompassLearning's Odyssey Math Study																									
Design Phase																									
1																									
2																									
3																									
4																									
5																									
6																									
7																									
8																									
9																									
Data Collection																									
10																									
11																									
12																									
13																									
Analyze Data/Report Writing																									
14																									
15																									
16																									
17																									
18																									
19																									
Authentic Assignments																									
Design Phase																									
1																									
2																									
3																									
4																									
Training and Formative Data Collection																									
5																									

Exhibit 2.3
Proposed Timeline and Schedule

(b)(4)

Exhibit 2.3
Proposed Timeline and Schedule

(b)(4)

Exhibit 2.3
Proposed Timeline and Schedule

(b)(4)

Exhibit 2.3
Proposed Timeline and Schedule

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Exhibit 2.3
Proposed Timeline and Schedule

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Exhibit 2.3
Proposed Timeline and Schedule

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Exhibit 2.3
Proposed Timeline and Schedule

(b)(4)

Exhibit 2.3

Exhibit 2.3
Proposed Timeline and Schedule

(b)(4)

Exhibit III-3.1
 Proposed Timeline and Schedule
 Task 3: National Laboratory Network

TASK 3	MONTHS*	YEAR ONE												YEAR TWO											
		Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
1	Provide Monthly Progress Reports to ED within 10 workdays after the end of each month	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	
2	Submit an Updated Annual Plan																								

TASK 3	MONTHS*	YEAR FOUR												YEAR FIVE											
		Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
1	Provide Monthly Progress Reports to ED within 10 workdays after the end of each month	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	
2	Submit an Updated Annual Plan																								

* Anticipated start date is April 2006
 ▲ = Deliverable
 ■ = In Progress

Exhibit III-4.4
Proposed Timeline and Schedule
Task 3: National Laboratory Network

(b)(4)

EXHIBIT III-5.1

PROPOSED TIMELINE AND SCHEDULE

MONTHS*	A	M	J	J	A	S	O	N	D	J	J	A	S	O	N	D	J	F	M					
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Task 5: Planning, Management and Reporting				▲																				
5.1 Update Annual Plan				▲												▲								
5.2 Form and Maintain a Governing Board			○	▲											○	▲								
5.3 Develop Standards and Indicators and Prepare Reports			●			●		●				●			●		▲							●
5.4 Schedule and Attend Meetings with ED	○												○											
5.5 Schedule and Attend Biannual Meetings				○						○	▲												○	▲
5.6 Prepare Monthly Progress Reports	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
5.7 Prepare Monthly Financial Reports	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
5.8 Cooperate with Year 3 Evaluation																								
5.9 Prepare Final Report																								

* Anticipated start date is April 2006

▲ = Deliverable

— = In progress

○ = Meeting

● = Quarterly review

**EXHIBIT III-5.1 (CONT.)
PROPOSED TIMELINE AND SCHEDULE**

Cont.	A	M	J	J	A	A	J	J	A	S	O	N	D	J	J	A	M	A	M	J	J	F	M	A	A	M	J	J	A	S	O	N	D	J	J	F	M	
	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60		
5.1				▲																							▲											
5.2			○	▲											○	▲											○	▲										
5.3						●	▲								●	▲																						
5.4																																						
5.5																																						
5.6																																						
5.7																																						
5.8																																						
5.9																																						

* Anticipated start date is April 2006

- ▲ = Deliverable
- = In progress
- = Meeting
- = Quarterly review

Schedule of Deliverables/Milestones	
Task 1: Regional Educational Needs Analysis, Training and Technical Assistance, Fast Response Applied Research and Development Projects	
Deliverable	Due Date
1.1 Regional Education Needs Analysis Training And Technical Assistance Response Unit	
Report on Establishment of Needs Analysis and Training and Technical Assistance Response Unit	April 1, 2006-June 15, 2006
Create and Maintain Database	April 1, 2006-March 31, 2010
Revised Fast Response Plan	April 1-June 15 every year
OMB Clearance Package (If required)	April 15 -October 15 every year
Documentation of IRB Approvals (If required)	April 1- July 1 every year
Monthly Progress Reports	May 1-May 10, 2006 and every month thereafter through March 2011
1.2 Fast Response Applied Research and Development Projects	
Revised Plans and Schedules for Year 1 Fast Response Applied Research and Development Projects	April 1-June 15 every year
Updated Plans and Schedules for Years 2 through 5 Fast Response Applied Research and Development Projects	June 1-July 1 2007-2010
OMB Clearance Package (If required)	April 15 -October 15 every year
IRB Documentation (If required)	April 1- July 1 every year
Monthly Progress Reports on Applied Research and Development Projects	May 1-May 10, 2006 and every month thereafter through March 2011
Draft Policy Briefs and/or Products for each Fast Response Project	One month after completion of project throughout contract
Final Policy Briefs and/or Products for each Fast Response Project	One month after submission of draft throughout contract

Schedule of Deliverables/Milestones	
Task 2: Rigorous Applied Research and Development	
Deliverable	Schedule
2.1 Detailed Research Plans for Rigorous Studies	
Revised Detailed Research Plans and Schedules for each Rigorous Study (For Years 1 through 5)	August 1-October 1 every year
Monthly Progress Reports	May 1-May 10, 2006 and every month thereafter through March 2011
Updated Plans for Rigorous Studies	May 1-July 1 every year
2.2 External Technical Working Group	
Draft TWG Plan	April 15, 2006-May 1, 2006
Final TWG Plan	May 1, 2006-May 15, 2006
Draft and Final Agenda	September 15, 2006 October 1, 2006 April 15, 2007 May 1, 2006 Repeated through end of contract.
Draft and Revised Minutes of TWG Meeting	November 1, 2006 December 1, 2006 June 1, 2007 July 1, 2007 Repeated through end of contract.
2.3 Forms Clearance	
Draft OMB Forms Clearance Package	August 15-October 15 every year
Revised OMB Forms Clearance Package	October 15-December 15 every year
Documentation of IRB Approvals	April 1-September 1 every year
Preparation of Privacy Act System of Records Notice (If required)	August 1, 2006-September 1, 2006
2.4 Planning for Data Collection, Site Selection, and Site Visit	
Draft Data Collection Instruments	May 15-August 15 every year
Revised Data Collection Instruments	August 15-October 15 every year
Proposed List of Sites with Explanation	May 1-July 1 every year
Final list of Participating sites	July 1-August 1 every year
Draft Protocols	June 15-August 15 every year
Revised Protocols	August 15-October 15 every year
2.5 Data Analysis and Report Preparation	
Compass Learning	
Draft Technical Report	June 15, 2006-August 15, 2006
Revised Technical Report	October 1, 2006-December 1, 2006
Final Technical Report	December 1, 2006-January 1, 2007

Schedule of Deliverables/Milestones	
Task 2: Rigorous Applied Research and Development (Cont.)	
Deliverable	Schedule
Draft Non-Technical Report	February 1, 2007-March 1, 2007
Revised Non-Technical Report	March 1, 2007-April 15, 2007
Final Non-Technical Report	May 1, 2007-May 15, 2007
Authentic Assignments	
Draft Technical Report(s)	November 1, 2006-January 1, 2007
Revised Technical Report(s)	February 15, 2007-April 15, 2007
Final Technical Report(s)	April 15, 2007-May 15, 2007
Draft Non-Technical Report(s)	June 15, 2007-July 15, 2007
Revised Non-Technical Report(s)	July 15, 2007-September 1, 2007
Final Non-Technical Report(s)	September 15, 2007-October 1, 2007
WISE	
Draft Technical Report(s)	October 15, 2007-December 15, 2007
Revised Technical Report(s)	February 1, 2008-April 1, 2008
Final Technical Report(s)	April 1, 2008-May 1, 2008
Draft Non-Technical Report(s)	June 1, 2008-July 1, 2008
Revised Non-Technical Report(s)	July 1, 2008-August 15, 2008
Final Non-Technical Report(s)	September 1, 2008-September 15, 2008
Concept Mapping	
Draft Technical Report(s)	August 15, 2010-October 15, 2010
Revised Technical Report(s)	December 1, 2010-February 1, 2011
Final Technical Report	February 1, 2011-March 1, 2011
Draft Non-Technical Report(s)	October 15, 2010-November 15, 2010
Revised Non-Technical Report(s)	January 1, 2011-February 15, 2011
Final Non-Technical Report(s)	March 15, 2011-March 31, 2011
AVID	
Draft Technical Report(s)	June 1, 2009-August 1, 2009
Revised Technical Report(s)	September 15, 2009-November 15, 2009
Final Technical Report	November 15, 2009-December 15, 2009
Draft Non-Technical Report(s)	January 15, 2009-February 15, 2010
Revised Non-Technical Report(s)	February 15, 2010-April 1, 2010
Final Non-Technical Report(s)	April 15, 2010-May 1, 2010
Cognitive Apprentice	
Draft Technical Report(s)	May 15, 2010-July 15, 2010
Revised Technical Report(s)	September 1, 2010-November 1, 2010
Final Technical Report	November 1, 2010-December 1, 2010

Schedule of Deliverables/Milestones
Task 2: Rigorous Applied Research and Development (Cont.)

Deliverable	Schedule
Draft Non-Technical Report(s)	December 15, 2010-January 15, 2011
Revised Non-Technical Report(s)	January 15, 2011-March 1, 2011
Final Non-Technical Report(s)	March 15, 2011-March 31, 2011

Schedule of Deliverables/Milestones
Task 3: National Laboratory Network

Deliverable	Due Date
Monthly Progress Reports	May 1-May 10, 2006 and every month thereafter through March 2011

Schedule of Deliverables/Milestones Task 4: Regional Dissemination	
Deliverable	Due Date
4.1 Design Dissemination System	
Revised Dissemination System Plan	May 15, 2006-June 15, 2006
Final Dissemination System Plan	June 15, 2006-August 1, 2006
Monthly Progress Reports	May 1-May 10, 2006 and every month thereafter through March 2011
Status Report on Dissemination Activities	July 1 every year
4.2 Dissemination of Research Based Reports	
Revised Products Plan for Year 1	July 1-September 15, 2006
Updated Products Plan for Years 2 Through 5	January 1-March 15, 2007 and every year thereafter
Final Report/Product	February 15, 2007-March 15, 2007 and every year thereafter
Electronic File to ERIC	February 15, 2007-March 15, 2007 and every year thereafter

Schedule of Deliverables/Milestones	
Task 5: Planning, Management and Reporting	
Deliverable	Due Date
5.1 Updated Annual Plan	
Updated Annual Plan	July 1, 2006 and every year thereafter
5.2 Formation and Functions of Governing Board	
Report on Forming Governing Board, By-Laws, and Members	May 15-June 15, 2006
Board Meeting	July 15, 2006 and January 15, 2007, and every year thereafter
Report on Each Governing Board Meeting, including minutes and actions	July 15, 2006-August 1, 2006 and January 15, 2007-February 1, 2007, and every year thereafter
5.3 ED Performance Monitoring	
Annual Performance Indicators Report	August 1, 2006-September 1, 2006 and every year thereafter
Additional Performance Data (If requested by ED)	Upon ED request
5.4 Meetings with ED	
Initial Meeting with ED	April 1, 2006-April 15, 2006 and every year thereafter
Other Meetings with ED	To be determined by ED
Meeting Summary Memos	April 15, 2006-May 1, 2006 and every year thereafter
5.5 Biannual Meetings	
Biannual Meetings	July 1, 2006 and January 1, 2007 and every year thereafter
Issues Memos/Summaries	July 1-15, 2006 and January 1-15, 2007 and every year thereafter
5.6 Monthly Progress Reports	
Monthly Progress Reports by Task	May 1-May 10, 2006 and every month thereafter through March 2011
5.7 Monthly Financial Reports	
Monthly Financial Reports	May 1-May 10, 2006 and every month thereafter through March 2011
5.8 Year 3 Evaluation	
Information as requested by ED	As requested by ED beginning in Year 3
5.9 Final Report	
Draft Report	September 15, 2010-December 15, 2010
Revised Final Report with an Electronic File	January 15, 2011-March 15, 2011

IV. PERSONNEL

IV. PERSONNEL

Authors: (b)(6)

Pennsylvania State University, with its subcontractors, has assembled an exceptionally well-qualified team of researchers, managers, analysts, and other experts who will conduct technically superior scientifically valid research and other tasks on time and within budget. Our team includes three top-tier task and study leaders with a combined 120 years of experience in the education field. Our project director has earned national recognition for his understanding of education research. Subcontract managers also possess extensive experience in the management of complex studies in the education field and will work in tandem with our project director to ensure technical success within cost constraints. The subcontract managers will form the M-CARE steering committee, who will provide the leadership, technical insight and management skills to achieve ED goals and vision of the RELs.

Our approach to staffing this large, important project crosses organizational lines, such that personnel from several organizations work collaboratively on all the tasks and studies. Each task and study leader personnel are knowledgeable of the State education agencies, local education agencies, higher education structure, policies and needs within the region, education policy, needs assessment, applied research, packaging of research findings for practitioners, dissemination mechanisms, and training and technical assistance. Staff from the six partnering organizations specialize in one or more of those areas (see our overview of each partner organization in the Organizational Experience and Capability Chapter contained in this volume).

In addition to their exceptional technical experience, our proposed staff have a wealth of experience handling large-scale projects characterized by multiple and concurrent tasks, and these individuals have track records of delivering high-quality products on-time and within cost. Our personnel have extensive experience in evaluations and the professional and educational background necessary to understand and contribute to the successful completion of all project tasks outlined in the Statement of Work (SOW). Moreover, the composition of our team reflects our commitment to providing a comprehensive approach to M-CARE's tasks. Our staff will provide technically superior performance, combined with the ability to bridge the gap between research and practice, and they will possess the skills to move technical information into the hands of both technical audiences and nontechnical audiences to obtain effective applications.

The combined expertise of the staff described below represents the full range of skills in management, research, technical assistance, and dissemination to ensure quality and timely work on all tasks and studies of this effort. An overview of the requisite skills by key personnel in each partner organization is presented in Exhibit IV-1.

Resumes for these staff are included in at the end of this chapter. All the partner organizations for the Mid-Atlantic Regional Educational Lab have additional staff proposed for this complex project. We have chosen to focus only on the key personnel in the Personnel Qualifications Chapter and in providing staff resumes for ease of review.

In addition to the key staff highlighted above, the M-CARE team has staff available with experience in designing and conducting evaluations of social services programs, needs assessments, education, training and technical assistance, project management, and more. We will draw from this pool of highly

qualified individuals to staff the regional laboratory team. We present the level of effort for key personnel in Exhibit IV-2. Brief biographies of staff are located in Appendix A of this proposal.

As requested in the RFP, we present the qualifications of the key personnel for the Mid-Atlantic Collaboration for Applied Research in Education (M-CARE). M-CARE key personnel include: Project Director; Subcontract Managers; Deputy Subcontract Managers; Task Leaders; Principal Investigators for Task 2 Studies; and Study Managers for Task 2 Studies. Personnel qualifications are then presented by position on the study as indicated in the categories above rather than by organization.

Overview of Key Staff

Key staff are presented according to proposed project positions. In each text box, we identify the organizational affiliation of the staff, their highest degree, and most relevant experiences.

Project Director – This is the key position on the project. The project director is responsible for overall management of the lab and the performance of the subcontractors. This individual is the key link to the governing board, the steering committee, and to the Department of Education.

(b)(4)

(b)(4)

Subcontract Managers – These individuals are responsible for the performance of work assigned to each subcontractor organization. This includes timeliness and quality of work, business relations, and maintaining the subcontract budget. Each of these individuals is the designated organizational representative to the project steering committee.

(b)(4)

(b)(4) earlier research and publications investigated gender differences in mathematical ability, assessment of classroom performance, peer collaboration, problem-solving, and students with learning disabilities. (b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4) Caliber provides staffing to the reviews of educational interventions and manages the supporting registry of evaluators of outcome evaluations. He previously conducted an evaluation of the ED predecessor effort to identify exemplary and promising programs, an evaluation that helped shape the current programs. (b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4) She brings 25 years of experience in the public sector—as a teacher, technology coordinator, cabinet member at a State education agency—and the nonprofit sector to her work with the (b)(4) (b)(4). She currently works with both the public and private sectors at the State and national level. This includes projects related to assessment of technology impacts on learning; gauging the progress of States, districts, and schools with educational technology; conducting program evaluations; convening national experts in discussions on policy issues; and designing and prototyping educational technology frameworks. (b)(4)

(b)(4)

(b)(4) (b)(4) She keynotes conferences at the State, national, and international levels; and will be presenting in China in October 2005. (b)(4)

(b)(4)

(b)(4) She is trusted and respected by the education community and will be an asset to the conducting, analyzing, reporting, and dissemination of research to inform educational practice.

(b)(4)

(b)(4) She works

closely with accreditation bodies, regional organizations, and colleague associations to develop joint programs and offerings.

(b)(4)

(b)(4)

(b)(4) served as a Chief Operations Officer and Vice President for several 8(a) and small business firms, where she was responsible for business development and management of multi-million dollar projects.

(b)(4)

Deputy Subcontract Managers – These individuals assist in management of the work of the subcontractor organizations. They serve as backup to the steering committee for the subcontract managers.

(b)(4)

(b)(4)

(b)(4) The U.S. Department of Education's Institute of Education Sciences established the WCC to provide educators, policy makers, and the public with a central, independent, and trusted source of scientific evidence of what works in education.

For the WWC, (b)(4) has reviewed the scientific literature pertaining to Peer Assisted Learning (PAL) programs, elementary and middle school mathematics, and character education. His responsibilities include the review of literature in these fields for scientific rigor and development of intervention reports based on rigorous coding procedures for dissemination on the WCC Web site.

(b)(4) serves as data manager and an analyst for the Institutional Development and Undergraduate Education Service (IDUES) program. He led the team that developed the format for IDUES reports and has been a key contributor to data reports based on IDUES APR information. (b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4)

(b)(4)

Additionally, (b)(4) performed evaluations of a number of state's EETT (Enhancing Education Through Technology) grant implementations, serving as the Lead Evaluator for Chicago Public Schools. (b)(4) has also been active in the development of assessment tools for evaluating both the impact of instructional technology in schools and the conditions that must be in place to ensure that impact. He is a frequent presenter at national and regional conferences and has served as a consultant on statewide training projects in Washington, North Dakota, and Illinois.

Task Leaders – These staff have first line responsibility for the management of each of the five tasks. They provide guidance to task staff, review all task work for quality, and oversee task budgets.

Task 1: Needs Assessment, Technical Assistance and Fast Response Studies.

(b)(4) Task 1.1 Leader, Rutgers (listed under Deputy Subcontract Manager).

(b)(4)

(b)(4)

(b)(4)

(b)(4)

Task 2: Rigorous Applied Research and Development

(b)(4) Task 2 leader, PSU (listed under REL Project Director).

Task 3: National Laboratory Network

(b)(4) Task 3 leader, Caliber.

(b)(4) a senior analyst at Caliber, has extensive experience in the field of education at all levels, local, State, and Federal. She has directed evaluation and technical assistance contracts for the U.S. Department of Education and the National Science Foundation. (b)(4) expertise includes the dissemination of evaluation and research findings by constructing messages for a variety of audiences. She has conducted interactive workshops and videoconferences to increase the dissemination of promising educational practices. She helped develop Web sites designed to increase communication among grantees. (b)(4) also developed a series of workshops to support the grantees of NSF's Urban Systemic Initiative to use data and evidence to report outcomes emerging from project activities, annual reports, midpoint presentations, media, and the public. This assistance was provided through the Internet, telephone conference calls, and presentations at conferences and workshops.

(b)(4)

(b)(4) has more than 20 years of evaluation experience and has served as an evaluation consultant to numerous associations, such as the National Association of State Boards of Education and the National Association of State Directors of Special Education, and school districts across the country. She has evaluated math and science magnet school programs, implementation of math textbooks, school reform initiatives in science and mathematics, programs for children and youth with disabilities and youth from underrepresented populations, and professional development initiatives. Much of her work focuses on factors impacting implementation, sustainability, or institutionalization of Federal programs and curricula. (b)(4) has been a public school teacher of grades Pre-K through middle school, teaching both math and science to academically diverse students. She also has been a faculty member at the University of Maryland, teaching both undergraduate and graduate students.

Task 4: Regional Dissemination

(b)(4) Task 4 leader, PSU. (b)(4)
(b)(4)

(b)(4)

Trained as a Rural Sociologist, much of (b)(4) work incorporates strong outreach components, with a research focus on rural community development and the relationship between rural schools and communities. A primary research interest is the relationship between residential mobility and rural development and/or underdevelopment within both international and domestic contexts. (b)(4)

(b)(4)

(b)(4) his efforts support research and outreach activities addressing rural education-related issues in Pennsylvania, as well as in domestic and international contexts. Ongoing center initiatives include research and outreach focused on rural Indian education, childhood obesity, social and academic interventions for transient student, and the relationship between telecommunications access and rural community development. (b)(4)

(b)(4) has developed close institutional ties and collaborative relationships with the national-level Rural School and Community Trust, and the State-level Pennsylvania Association of Rural and Small Schools.

Task 5: Planning, Management and Reporting

(b)(4) Task 5 leader, (b)(4)
(b)(4)

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Principal Investigators – Task 2 Studies – These personnel have the lead on designing the rigorous studies and in guiding the analysis and interpretation of results.

AVID

(b)(4) Co-Principal Investigator,
(b)(4)

has served as the principal investigator and project manager for several rigorous evaluation designs, provided evaluation training and technical assistance, and has developed several publications translating research into practice for the youth development field. (b)(4)

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(b)(4) The study includes both quasi-experimental and experimental designs. Additionally, (b)(4) has designed and implemented several rigorous evaluations (experimental and quasi-experimental studies) of prevention and intervention programs for at-risk youth, including (b)(4)

(b)(4)

(b)(4)

(b)(4) (b)(4) is an Associate

Professor in the Department of Educational Psychology, Program in Counseling Psychology at Rutgers, The State University of New Jersey. She is the coordinator of the counseling psychology program, and is a licensed psychologist. (b)(4) (b)(4)

(b)(4) This grant,

funded by the U.S. Department of Education, focuses on providing low-income students with the academic skills and supports needed to foster success in school and to help students and their families to begin early in preparing for postsecondary education opportunities.

(b)(4)

(b)(4) research focuses on student achievement and personal development among culturally diverse students. Her research also focuses on the development of training models designed to enhance cultural competence in counselors and educators.

She is a member of the American Psychological Association, the American Counseling Association, and the American Educational Research Association, and serves on the Editorial Board of the *Journal of Multicultural Counseling and Development*.

Compass Learning

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The first year results of the ITSS showed statistically significant improvement in reading comprehension of students using the ITSS for one year. Currently there are more than 1,000 students and 20 public and private schools participating and preparing to participate in the efficacy tests of the Web-based ITSS. (b)(4) not only designed the entire technology and interaction infrastructure but she also served as the liaison to recruit participating schools and seeking additional funding for the project.

(b)(4)

Before coming to Penn State, (b)(4) was director, Distance Education Development, and Director, Institutional Research at a State university. Prior to that she was senior consultant at Accenture corporation, designing and developing technology solutions for large companies. Her expertise includes the development of technology solutions and studying the effects of computer technologies in problem-solving.

She has worked with the leadership and teachers in more than 10 school districts in Western Pennsylvania, and maintains strong, positive, professional relationships with all these districts. (b)(4) also serves on the School Board of the Quaker Valley School District in Western Pennsylvania, the first "digital school district" in Pennsylvania.

Cognitive Learning Through Apprenticeship

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(b)(4)

She began her career as a classroom teacher, then became a reading specialist. Her area of research deals with early literacy development and the organization and management of Language Arts Programs. Her research is carried out with children and families from diverse backgrounds.

(b)(4) has more than 200 publications that appear as journal articles, chapters in books, monographs and books. She has received numerous grants for her research from the Federal government and has served as a principal research investigator for several research centers. She received Excellence in Research, Teaching and Service Awards from Rutgers University. She was the recipient of the International Reading Association's Outstanding Teacher Educator of Reading Award and Fordham University's Alumni Award for Outstanding Achievement.

She was an elected member of the board of directors of International Reading Association (IRA) an organization of 80,000 educators in 100 countries and served as President of the organization in 2003-2004.

(b)(4)

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(b)(4) has worked in teacher education teaching literacy education and foundations courses in the elementary teacher education program at OISE/University of Toronto, Canada. She has co-written three books in the areas of New Literacy Studies, critical literacy, multi-literacies, and multimodal literacy (b)(4)

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(b)(4) is currently working on a book on family literacy and how to build outside literacy practices into literacy programs. She has published three articles in refereed journals and four chapters in books in the area of literacy education. She has conducted several small research studies through internal university grants on bridging the gap between outside literacy practices and literacy practices that take place in school. She has given several papers and chaired symposia at such international conferences as the American Educational Research Association Annual Conference (AERA), the United Kingdom Literacy Association Annual Conference (UKLA), the Annual International Linguistics Association Conference (AILA) for the literacy cluster, and the Canada Social Science Annual Conference for the literacy (CSSE) cluster.

Authenticity

(b)(4) (b)(4) has extensive experience conducting field-based studies of technology programs in K-12 and university settings. As an evaluator for CENS Educational Group, (b)(4) evaluated the efficacy of an education module that incorporates real-time data from embedded network sensors; designed a field study, constructed measures, and advised on professional development and implementation of studies. (b)(4) designed and implemented scientifically-based research study involving technology use in middle-school science classes. She conducted evaluations of numerous, large-scale K-12 and University education technology initiatives nationwide. Project funding sources included NSF, EETT, PT3, and Lilly Foundation funds.

(b)(4)

(b)(4) worked on a team commissioned by the State Education Technology Directors Association (SETDA) to recommend the data that should be collected by each State to meet Federal technology-related reporting requirements and contributed to development of methods and instruments used for technology-use data collection in each State. She has had numerous publications and has participated in State and national educational initiatives, (b)(4)

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has been involved in designing, developing, and evaluating innovative mathematics and science curricula for the elementary school to the college level. (b)(4) (b)(4) primary research interest is how people learn content in complex domains from active participation, both physical and social.

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(b)(4) Many of these projects contributed to the research foundation for the development of Bransford and colleagues' How People Learn (HPL) principles for designing learning environments.

(b)(4) she is cooperating with local elementary schools to improve assessment tools for young children's mathematics and to examine how hands-on activities impact mathematics learning. In addition, she is investigating the effects of curricula based on How People Learn principles on the development of adaptive expertise in biomedical engineering through cooperation with the VaNTH Engineering Research Center in Bioengineering Educational Technologies. In this work, she has led the effort to develop, implement, and evaluate assessments of adaptive expertise. She has published the results of this research in journals and presented at national and international conferences.

WISE/TELS

(b)(4) (b)(4)

(b)(4) brings a

long-standing commitment and interest in mathematics and technology in education and was among the pioneers introducing computers for administrative and instructional applications in K-12 schools.

He spent 8 years working for the U.S. Department of Education's Programs for Elementary, Secondary, and Postsecondary Education Research and Statistics, as a Legislative and Budget Analyst. Additionally, upon joining SRI

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International, (b)(4) worked with Ed Esty, the principal math consultant for *Square One TV*, to develop award-winning mathematics video programs widely used in schools and, more recently, multimedia software for mathematics teaching and learning that incorporates computer tools, such as spreadsheets, data tables, and geometric sketches. (b)(4) has been part of many significant research, evaluation, and strategic planning projects and has additional experience in business development, writing for multiple audiences, and creation of instructional materials.

(b)(4)

Concept Mapping

(b)(4)

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(b)(4) He

teaches graduate courses in Project Management, Evaluating Learning Outcomes (i.e., using surveys, interviews, observations, traditional posttests, and nontraditional approaches), Integrating Technology in Schools, Instructional Design, and Designing Web-based Instruction. He regularly teaches a graduate course in local school districts as part of meeting the specific needs of teachers in their own classrooms.

(b)(4) He has published more than 40 experimental investigations, served as chair on two dissertations, and recently completed a Fulbright award at the University of Oulu, Finland. (b)(4) is a highly proficient data analyst, using multiple analytic and database software packages including SPSS and knowledge representation software such as Pathfinder networks and multidimensional scaling, and has written two analytical software packages, *ALA-Mapper* and *ALA-Reader*.

(b)(4) taught for 9 years in K-12 education, both elementary (5 years) and secondary (4 years) and then worked in the private sector for 10 years in training design, project management, and evaluation. (b)(4) has extensive experience with multi-site evaluations of software and technology use with K-12 and adult populations and the development of national survey instruments such as the Distance Learning Profile Instrument.

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AVID

(b)(4)

He has served as director and team project leader in a variety of programs and initiatives and as a coordinator for several projects. (b)(4) collaborates in the dissemination and implementation of the Coalition of Essential Schools school reform model for CESNJ. Recently he served as project planner and trainer in staff development activities in the Center's work in the Paterson New Jersey School District. (b)(4)

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AVID statewide initiative in New Jersey. In this capacity, he coordinated and provided training and staff development, program monitoring and evaluation, individual school consulting, and program and instructional coaching. (b)(4) is a certified AVID trainer in administration, English, and PATH training. In addition to local staff development throughout New Jersey and in New York, he conducted staff development at AVID Regional Summer Institutes in Atlanta and San Diego. He has also served on the AVID New Jersey advisory committee. Currently, (b)(4) serves as staff advisor to the CESNJ advisory board.

Compass Learning

(b)(4)

Cognitive Learning

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Authenticity

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WISE/TELS

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Concept Mapping

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Parent Involvement

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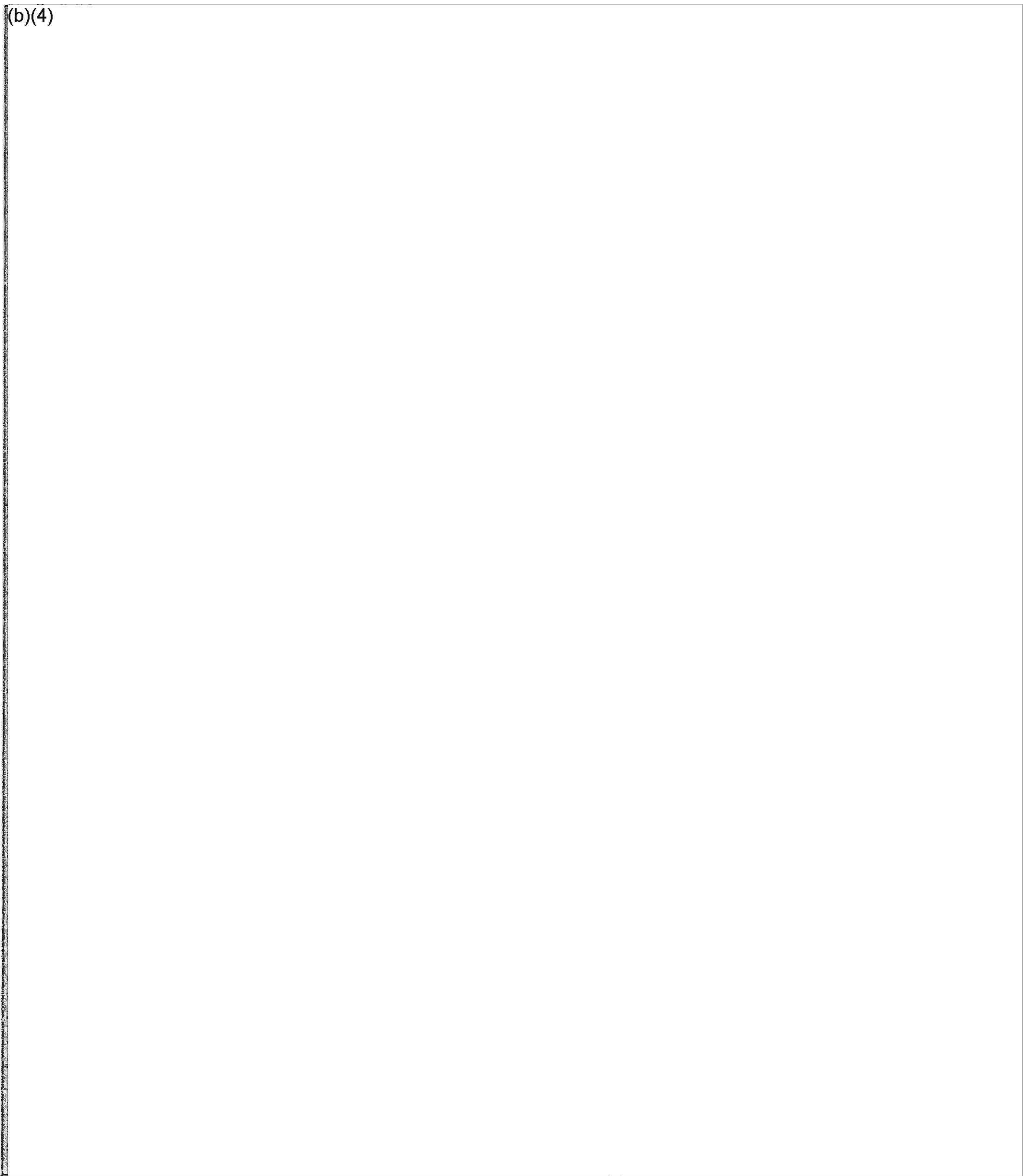
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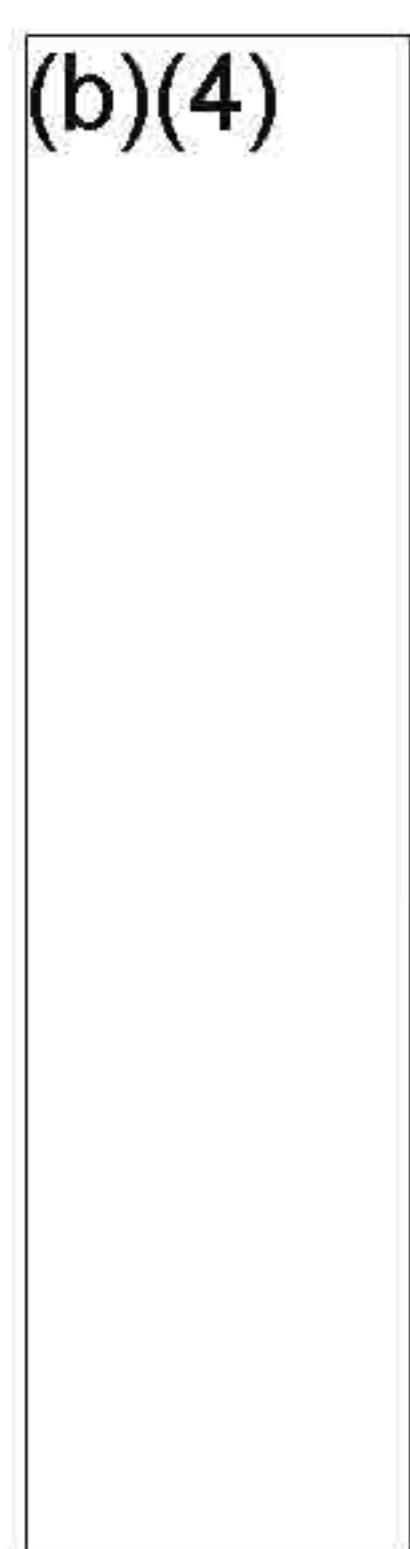
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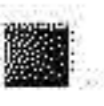
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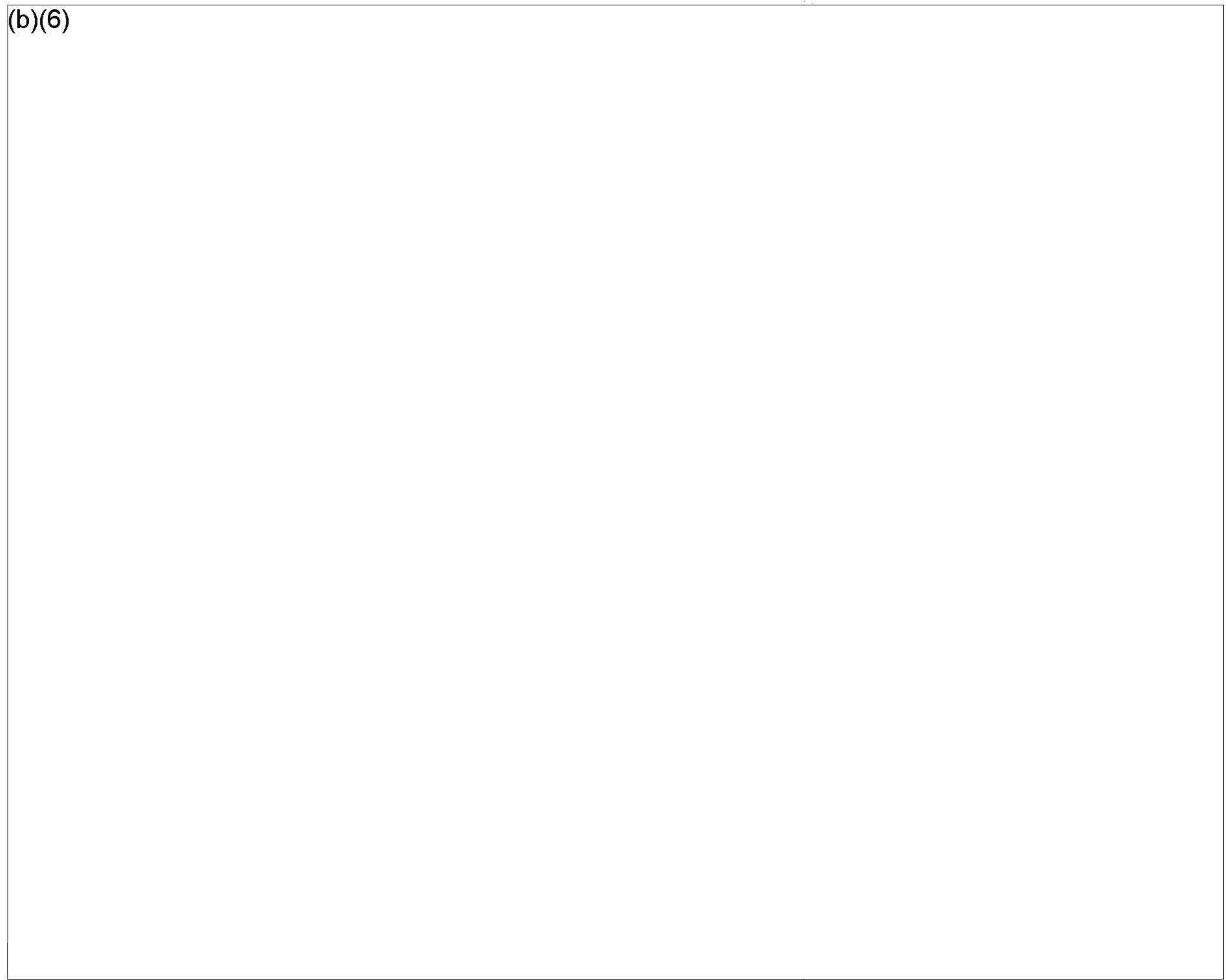
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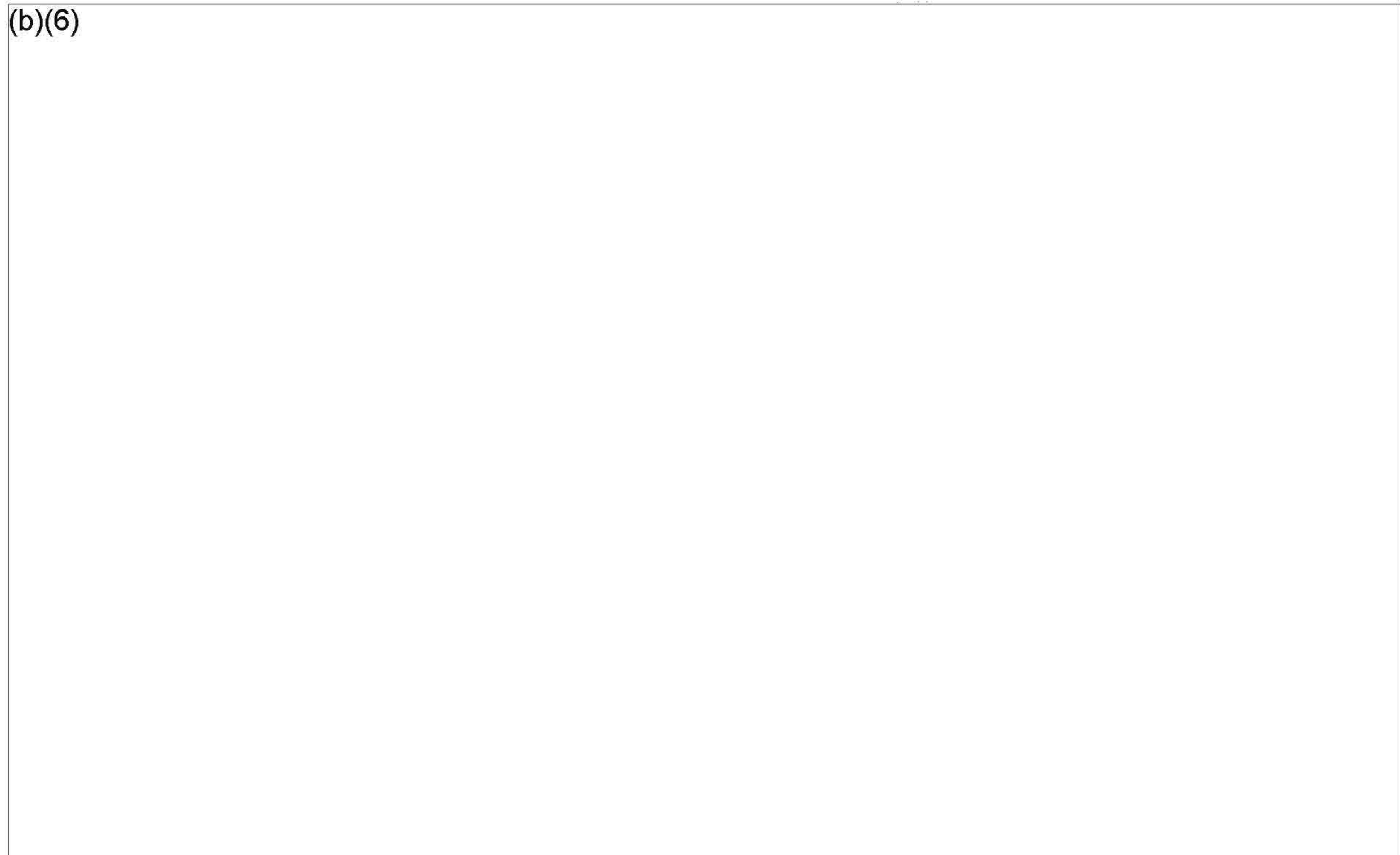
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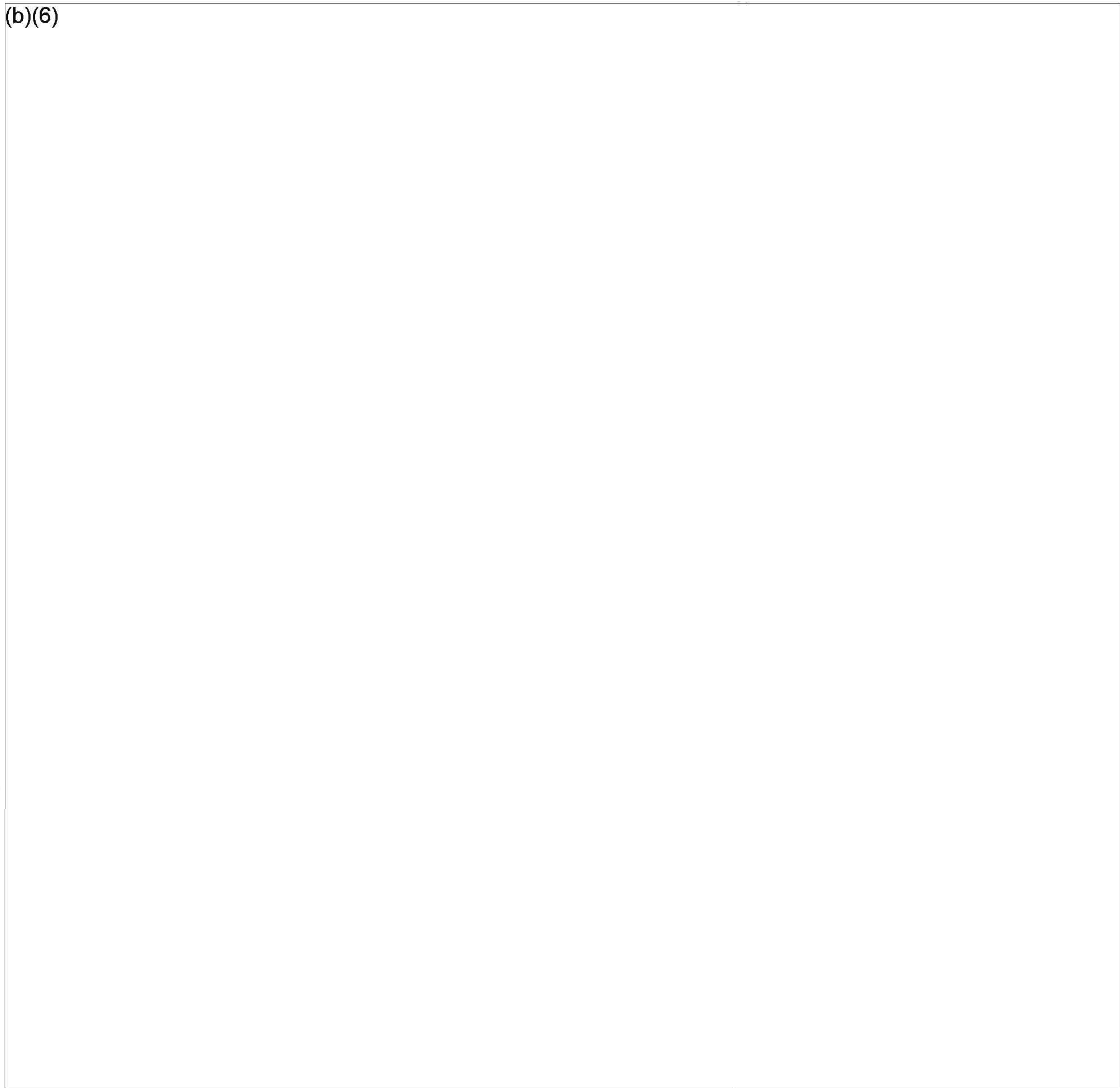
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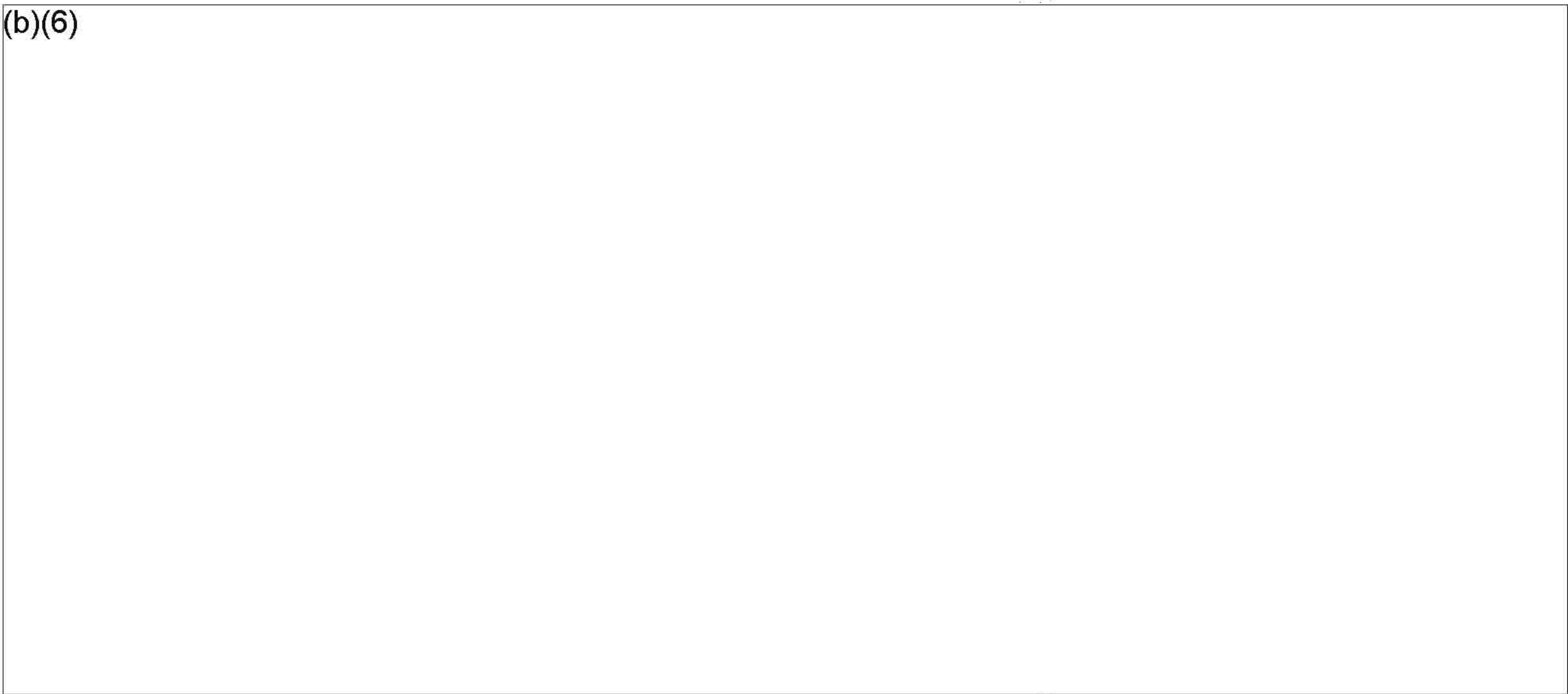
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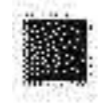
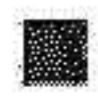
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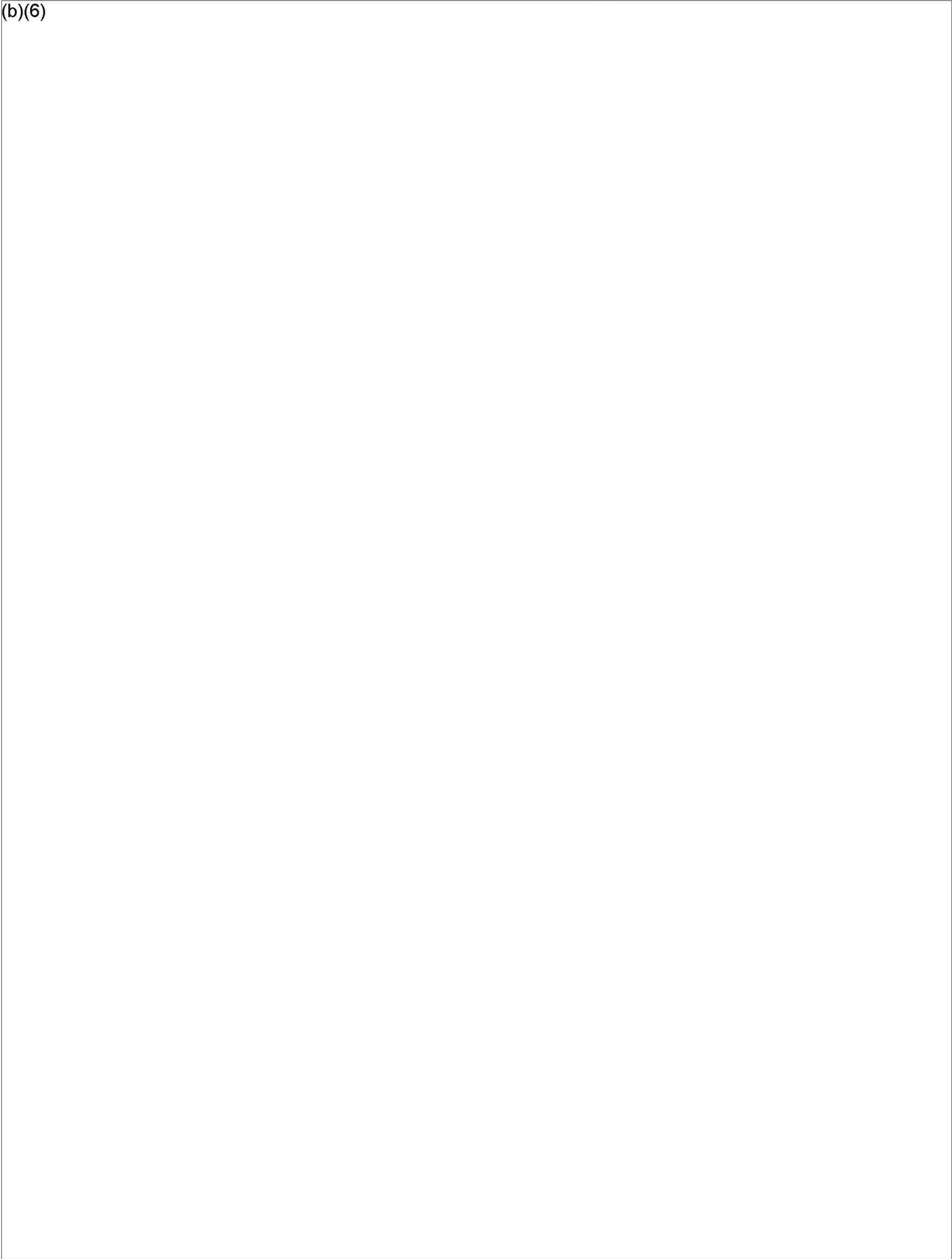
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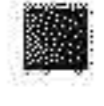
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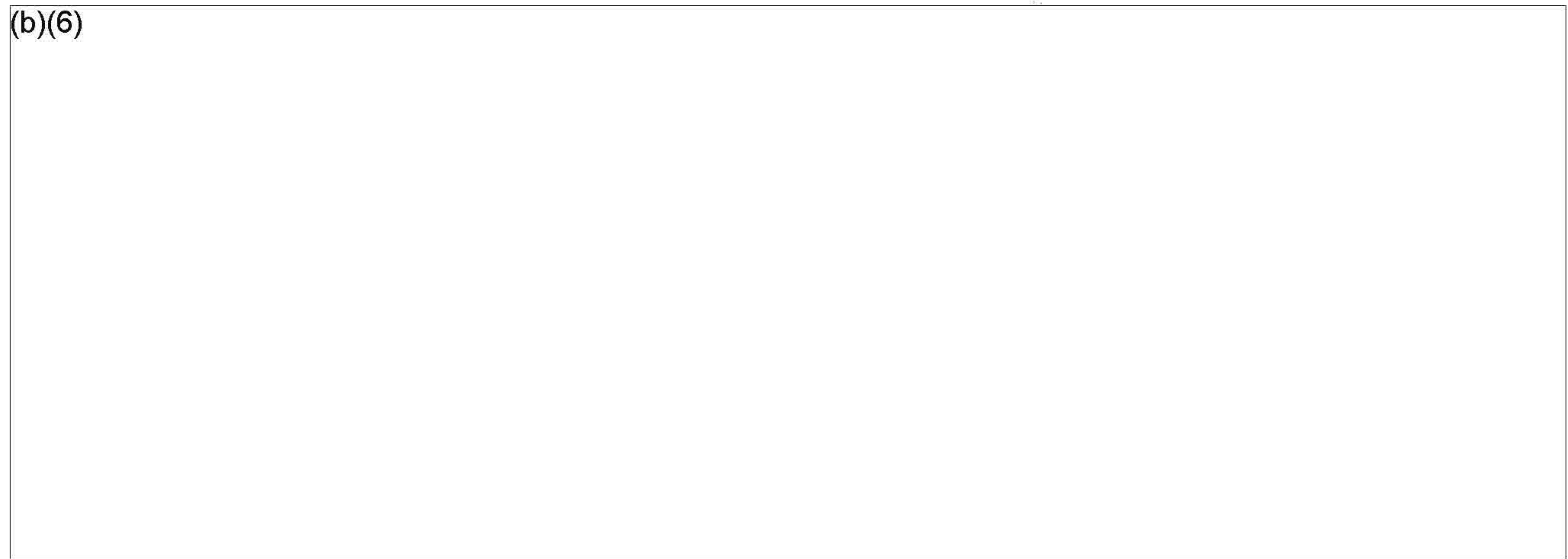
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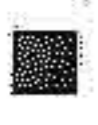
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V. MANAGEMENT PLAN

V. MANAGEMENT PLAN

Authors: (b)(6)

In this chapter, we present our plan for managing the Mid-Atlantic Collaborative for Applied Research in Education (M-CARE). First, we describe the organizations that are teamed for this bid, the roles and responsibilities of each organization, and our management strategy. We then provide a description of the project organization with key personnel by task, the governing board, and other major consultants. Next, we discuss our management system, including internal and external governance mechanisms, management processes for subcontractors and consultants, and tools for exerting fiscal and quality control. Finally, we discuss our oversight procedures as they relate to internal and external functions of the Lab.

1. MANAGEMENT STRATEGY

We propose a management strategy that carefully considers the requirements in the Request for Proposals, and that addresses all tasks and subtasks for this project.

■ (b)(4)

- Addresses management controls and oversight through highly competent leadership ready to ensure smooth implementation and, as necessary, appropriate refinement of the management plan and annual work plan
- Involves communication strategies that view the governing board, Lab staff, external consultants, U.S. Department of Education (ED) staff and SEAs, LEAs, and schools as partners working collaboratively to achieve the desired educational reforms
- Ensures quality through supportive infrastructure and quality control mechanisms, many of which are part of the existing organizational structures and resources.

1.1 The Team

(b)(4)

1.2 Project Organization

Internal Structure and Organization

Absence of a well-organized staff, with clear lines of authority and responsibility, effective coordination and control procedures, and strong communication mechanisms greatly diminishes the practical utility of the best technical knowledge and expertise. We, therefore, propose a collaborative leadership structure that blends seasoned talent from all partner organizations. (b)(4)

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External Structure and Organization

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1.3 Key Personnel

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2. MANAGEMENT SYSTEM

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2.1 Communication and Coordination with the Department of Education

Closely linked with the principle of excellence is our belief in a strong, close working relationship and communication with client staff, particularly the COR. Ultimately, project success depends on effective communication. Direction, guidance, and input from the COR and other ED staff are important to successfully meeting the delivery schedule. We start with the belief that the client is in the best position to determine needs and requirements for contractor support and to assess the value and utility of final products. As such, we propose four mechanisms to foster effective communication and coordination:

- Monthly teleconferences with the COR, other ED staff, the Project Director, Principal Investigators, and task leaders as appropriate
- Frequent telephone and electronic mail conversations between the COR and the Project Director
- Monthly progress and financial reports that summarize major accomplishments for the month, including significant findings/events, problems encountered, staff use, plans for the upcoming month, personnel assignments, and hours charged by task
- Quarterly meetings with presentations to ED that describe the status of the work and the studies. In these meetings we will review the status of tasks based on the annual plan, budget updates, and discussion of any problems and suggested solutions. Project staff will provide the COR with monthly memoranda summarizing the findings of studies and tasks.

2.2 Management of Subcontractors and Consultants

(b)(4)

(b)(4) To achieve and maintain proper coordination and communication among these important players, each group has been assigned designated roles as described in Section 1.2 of this chapter.

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2.4 Quality Control Processes


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**Exhibit V-1
Partner Organization**

(b)(4)



**HUMAN SUBJECTS PROTECTION
ATTACHMENT**

HUMAN SUBJECTS PROTECTION IN THE CONDUCT OF RESEARCH

The research activities in Task 1 and the studies in Task 2 will need to be reviewed by an Institutional Review Board (IRB) to ensure compliance with U.S. Department of Education regulations (Title 34, of the Code of Federal Regulations, Part 97). We believe that all the proposed research activities, other than any that might involve anonymous data collection with no disaggregation of the data, are covered under these provisions.

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These constitute the general guidance that will be given to selected REL staff, including Task 1 and Task 2 leaders, Task 2 study managers and principal investigators, and subcontract managers for the organizations, (b)(4)

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VI. ORGANIZATIONAL EXPERIENCE AND CAPABILITY

VI. ORGANIZATIONAL EXPERIENCE AND CAPABILITY

This chapter presents the qualifications of the project team to conduct successfully the activities of the Mid-Atlantic Regional Educational Laboratory (M-CARE). We first describe the capabilities of the partnering organizations. In addition to each organization's capabilities, we provide information on our team's location, facilities, and equipment for carrying out the activities of the Lab. Finally, we provide one-page summaries of specific projects that demonstrate the requisite capabilities

1. OVERVIEW OF PROJECT TEAM

M-CARE is composed of two universities, Penn State University and Rutgers, and four organizations, Caliber, SEI Enterprises, Inc. (SEI), Metiri Group, and the Association for Supervision and Curriculum Development (ASCD). These partners provide excellent geographic coverage of the Mid-Atlantic region as well as outstanding expertise in designing and conducting applied research and in providing technical assistance specific to school reform. Penn State University, Rutgers, Caliber, and Metiri Group provide demonstrated educational research capability, while Rutgers and Caliber also provide school-based technical assistance experience. ASCD is a national educational organization well known for its design and dissemination of high-quality, research-based products. SEI brings expertise in meeting planning and logistics to the team. Both Metiri Group and SEI are small businesses; SEI is also an 8(a) small business.

The team represents broad geographic coverage of the Mid-Atlantic region. PSU is centrally located in the State of Pennsylvania, with 23 locations across the State. In addition to serving large urban areas, PSU, as the State land grant institution, fulfills its mission of outreach to rural areas throughout the State. Rutgers University represents all of New Jersey as that State's land grant institution. Caliber, ASCD, and SEI are both in the Washington, D.C., metropolitan area, with easy access to schools in the District of Columbia and Maryland. Additionally, Rutgers University's Center for Effective School Practice (CESP) has provided technical assistance in the State of Delaware. In this section we provide background information on each of these project team partners.

2.1 The Pennsylvania State University

The Pennsylvania State University is a large research-oriented institution with 23 campuses and more than 81,000 students. It is Pennsylvania's land grant university, and its administrative center is at the University Park campus near State College. Penn State's research expenditures in 2005 totaled \$630 million, buoyed by the University's strength in interdisciplinary projects that involve collaborations by faculty members and students from across the University. In 2003, expenditures from Federal agency sources exceeded \$300 million for the first time. According to National Science Foundation data for 2003, the most recent tally available, Penn State ranks 11th among all U.S. universities in research and development expenditures.

Penn State's College of Education, the proposed location of M-CARE, mirrors the university's three-part mission of teaching, research, and service. According to the 2006 *U.S. News & World Report* rankings of college programs, PSU's College of Education is one of only two programs to be nationally ranked in every discipline. One important factor in these rankings is the ability to compete for and successfully complete externally funded research. In addition to its internally funded research efforts, in 2004-2005, Penn State's College of Education attracted \$10.8 million in externally funded research from Federal, State, and foundation sources.

PSU's faculty, consisting of 111 tenure-track professors and 130 affiliated faculty members in other disciplines, is one of the most productive in the United States in research, publications, grants, and direct service programs. They are leaders in their fields regionally, nationally, and internationally, and they serve as members of 218 panels, governing boards for State and national organizations, and editorial boards for major journals. The College of Education is home to 18 major journals in education and counseling, including the *American Journal of Education*. Our faculty has earned seven Fulbright and seven Spencer Fellowships over the past 10 years. Twenty faculty members have pledged to devote 10 percent or more of their time to support the work of the Regional Educational Lab (REL).

The mission of Penn State's College of Education is to prepare teachers, scholars, and researchers as exemplary leaders, and to advance the profession of education through the science and art of teaching and learning, clinical processes, technology, research, and policy development. The work of the Regional Educational Lab is directly related to two College of Education goals:

- To provide leadership in the development of collaborative relationships with schools, organizations, and institutions concerned with improving schools and the processes of teaching and learning (aligned with Task One); and
- To improve the practice of education through research, innovation in teaching, the processes of learning, the uses of technology, clinical development, leadership, and management (aligned with Task Two).

2.2 Rutgers University

With more than 50,000 students on campuses in Camden, Newark, and New Brunswick/Piscataway, Rutgers is one of the nation's major State universities. Chartered in 1766, it has a unique history as a colonial college, a land-grant institution, and a State university. Its 29 degree-granting units offer more than 100 distinct bachelor's, 100 master's, and 80 doctoral and professional degree programs.

The university's mission of teaching, research, and public service aligns well with the goals of the Regional Educational Laboratories to meet the educational needs of the region through the utilization of scientifically valid research. Rutgers is home to numerous research institutes that contribute to the breadth of educational knowledge and depth of research expertise of the PSU team. One of these centers, CESP, is a crucial member of the PSU team. RU-CESP features innovative, research-based initiatives that have been field-tested to improve pre-K through 12+ classroom and school organizational practices and advance achievement for all students. CESP programs emphasize student attainment of State and national content standards as well as the preparation of lifelong learners.

Recognizing the vital role of the school leader, CESP offers initiatives to address leadership training and mentorship of new, veteran and aspiring principals. Additionally, CESP emphasizes community and parental involvement in its work with schools. Technical assistance, professional development, and special programs are available in a variety of areas. CESP emphasizes action research, as well as formative and summative evaluation of programs. The institutional relationship with the Rutgers Graduate School of Education (RU-GSE) strongly supports the CESP approach to school improvement—research informing practice and practice informing research. State and local education agencies, teachers,

and administrators benefit from faculty research and expertise, and faculty members can take advantage of greater knowledge about school operations and reflective instructional practice.

In addition to Rutgers Graduate School of Education, RU-CESP works collaboratively with other Rutgers departments and centers, including the Rutgers-Newark Department of Education; the Rutgers University Center for Applied Professional Psychology; the Rutgers Office of Research and Sponsored Programs; the National Institute for Early Education Research; the NJ Center for Character Education; the Institute on Education Law and Policy; the Center for Family Involvement in Schools; the Center for Children and Childhood Studies; the Center for Mathematics, Science, and Computer Education; and the Rutgers University division of Continuous Education and Outreach.

2.3 Caliber

Since 1983, Caliber has provided innovative program, information technology, applied research, evaluation, and technical professional services on more than 1,000 client assignments under contract to Federal, State, and local government agencies, private businesses, and not-for-profit organizations totaling approximately \$45 million in annual revenues. Our mission is to provide high quality research and consulting services that help organizations develop and manage effective programs for the public good. Our work has focused largely on government social programs, including education, family and youth services, substance abuse treatment and prevention, juvenile justice and delinquency prevention, child welfare services, military families and quality of life, and welfare reform. Caliber's headquarters in Fairfax, VA, houses more than 300 employees.

Caliber is organized into three major practice areas: Research and Evaluation, Information Technology and Communication, Training and Technical Assistance. This combination of skills and experience makes Caliber one of the few organizations that can leverage internal resources to bring research to practice. Caliber's professional and support staff have management, analytical, technical, academic, administrative and training capabilities. Caliber's professional staff hold advanced degrees in a broad range of behavioral science disciplines. Staff with leadership responsibilities are seasoned professionals, averaging nearly 20 years of applied consulting experience with government agencies.

Nearly all of the Caliber personnel proposed to work on the REL are members of the Education Studies Department, one of Caliber's nine practice areas. Our group is composed of highly skilled professionals who understand the current issues and developments in education as they pertain to educators, researchers, and policy makers. The team's philosophy toward client service is to treat each assignment individually and develop an approach and workplan best suited to that project's unique goals and objectives. We are, above all, committed to providing high-quality services and products tailored to the needs and realities of our clients, on time, and on budget. For these reasons, our clients continue to use our research and evaluations to improve K-12 and postsecondary programs and educational policies at the Federal, State and local levels.

2.4 The Metiri Group

The Metiri Group, located in Culver City, Calif., is a national consulting firm specializing in the research and evaluation of K-12 learning technology. This small business firm was established in February 2000 by (b)(4), a nationally recognized leader respected for her vision and accomplishments in

public policy and practice in learning technology. A second Metiri partner, (b)(4) adds to that experience and expertise in curriculum, professional development, research design, and evaluation.

The Metiri Group provides services including public policy consultation, school technology audits, and online assessment designs. The Metiri Group clientele includes U.S. congressional committees, private sector companies, national education labs, state education agencies, foundations, professional organizations, and a host of school districts. The Metiri team has been asked to provide insights and expertise at the national level. For example, in 2003, (b)(4) served on a committee advising the U.S. Department of Education on design of a \$14 million evaluation of the effectiveness of technology in learning. For a third consecutive year, the State Education Technology Directors Association (SETDA) has commissioned Metiri Group to collect national data on NCLB II D and write their annual report, *National Trends: Enhancing Education Through Technology*. That report has been the basis of more than 50 meetings with congressional members. Metiri also developed a national framework of core data elements for SETDA and associated assessment instruments aligned to the framework—one of the few that has been validated through data analysis in large-scale implementations.

The Metiri team has also distinguished itself in its systems thinking, linking policy, capacity building and research in technology to learning in classrooms and schools. This team's specialty is gauging the impact of technology in schools and on learning—a topic on the radar screen of literally every school district in the country. In its first three years, the Metiri Group worked closely with the North Central Regional Educational Laboratory (NCREL) to co-develop enGauge, a nationally recognized framework for effective use of school technology, www.ncrel.org/engauge. Metiri Group has also partnered with NCREL in the development of 21st Century skills, a framework for providing the public, industry, and educators with a common understanding of what children need to succeed and thrive in the digital age. Metiri is well grounded in the research on learning and technology and recently released a product that provides districts with insights into research-based technology solutions in early literacy.

2.5 Association for Supervision and Curriculum Development

Founded in 1943, and headquartered in Alexandria, VA, the Association for Supervision and Curriculum Development (ASCD) is a nonprofit, nonpartisan organization that represents 170,000 educators from more than 135 countries and 60 affiliates. Comprising education's largest nonunion membership organization, our members span the entire profession of educators—superintendents, supervisors, principals, teachers, professors of education, and school board members. ASCD provides education information services, offers professional development for effective teaching and learning, supports activities to provide educational equity for each learner, and each year produces hundreds of resources that support best practices for educators throughout the world.

During 2004, ASCD received multiple awards honoring accomplishments in publishing and video production. Three ASCD books were also finalists in the prestigious Association of Educational Publishers publishing awards program. Additionally, ASCD continues to seek opportunities to reach out to educators worldwide. As of August 2004, 60 publishers in 27 countries had published 186 translations of ASCD books and videos. To further support its advocacy work, ASCD, in March 2004, unveiled the ASCD Action Center for Quality Learning and Teaching, a free online service that connects ASCD members, constituents, and others interested in education with resources and information to help them speak out on education issues.

ASCD also offers various resources to help educators understand and implement the mandates of the No Child Left Behind (NCLB) law. In 2004, in addition to articles in print and online publications, the Association provided regular *ASCD SmartBrief* coverage, tracking, and a special report; collaborated on the Learning First Alliance report, *A Practical Guide to Talking with Your Community About No Child Left Behind and Schools in Need of Improvement*; and devoted a special *Infobrief* to NCLB.

Through involvement in key national and international issues, ASCD has provided resources and expert opinions on a variety of broad-based issues. ASCD is known throughout the profession as an expert source and content provider and for its ability to identify educational trends and translate research into practice. These qualifications make ASCD well suited for its role on the PSU team as a resource for dissemination of evidence-based research reports and educational interventions.

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2. RESOURCES, FACILITIES, AND EQUIPMENT

This section describes the resources, facilities, and equipment available through the organizations that comprise M-CARE. Collectively, these assets provide the meeting capabilities, technological expertise, and interdisciplinary content knowledge needed to provide high quality services through M-CARE.

2.1 Pennsylvania State University

As a major university dedicated to the improvement of education, Penn State has key resources already in place and available to the REL to facilitate a smooth start and ongoing success. Each of these important resources is described below.

Meeting Facilities

Pennsylvania State University has facilities all over the State, offering geographical proximity to clients, ample meeting space, and cutting-edge technology. The Penn State Conference Center is at the geographic center of the State with more than 58,000 square feet of dedicated meeting space and the State's most technologically sophisticated audiovisual support, including video conferencing, interactive learning systems, a multi-station computer lab, a mobile computer lab that can be installed in any room, and a high-speed wireless network throughout the building. The center can accommodate meetings hosting up to 1,500 participants, with 300 onsite guest rooms as well as collaborative arrangements with local hotels.

Technology Infrastructure

Penn State's Information Technology Services (ITS) provides the infrastructure for maximum use of information technology tools for learning, teaching, research, outreach, administration, and support activities, and the information technology resources required to support continuous improvement in the University's ability to fulfill its diverse mission. Among the ITS operating units is Academic Services and Emerging Technologies (ASET), which designs, develops, and operates the information technology infrastructure necessary for the University's technology services. ASET performs research and development in information technology for developing, defining, and promoting an information technology architecture that positions the institution to take advantage of rapidly emerging opportunities.

The Graduate Education and Research Services (GEaRS) group, a part of ASET, strives to meet the computing technology needs of scholars in their education and research endeavors at Penn State. The group pursues cutting-edge advances in research computing technology in partnerships with faculty members and in strong technical collaborations with various technology companies and institutions. The High Performance Computing (HPC) group, a division of GeaRS, offers a variety of machines for use in physical, biological and social sciences; engineering; and business-related computations. The HPC group continually researches issues relating to operating systems, file systems, storage, scheduling, high-speed interconnect, compilers, libraries, and application codes, and implements a consistent set of solutions for use by faculty and students.

Grant and Contract Management Infrastructure

The College of Education's Grants and Contracts Office processes proposals and awards for sponsored programs for all faculty/staff in the College. This includes proposals and awards in research, extension, and undergraduate education. The office provides administrative assistance with policies and procedures for sponsored programs. It serves as the liaison between faculty and the Office of Sponsored Programs. Other responsibilities include post-award administration.

The Social Science Research Institute

The mission of Penn State's Social Science Research Institute (SSRI) is to promote research encompassing the wide range of skills and perspectives needed to solve complex social problems. SSRI fosters communication and collaboration across all the social science disciplines and provides a shared infrastructure for social science research that enables faculty to conduct high-quality studies. SSRI is open to all social scientists at Penn State.

The Survey Research Center

SSRI's Survey Research Center (SRC) provides state-of-the-art and cost-effective survey research services to Penn State faculty and administrative units. SRC is a focal point for Penn State faculty in disciplines whose research interests include the methodology of survey research. SRC provides services in survey design, sampling, and data collection (including telephone, mail, face-to-face, Internet surveys, and focus groups); survey data management; and data analysis. Center staff assist researchers in estimating the costs associated with the collection and analysis of survey data.

Center on Rural Education and Communities

The mission of the Center on Rural Education and Communities (CREC) is to conduct and support research and outreach activities that address rural education and community-related issues in Pennsylvania, the nation, and the world. Based in Penn State's College of Education, CREC takes the land-grant mission of the university seriously in its commitments to providing education and service to the people of Pennsylvania and beyond. Additionally, CREC realizes that the wisdom of practice *must be combined* with the insights from scientific research

CREC has three major goals:

- To foster nationally significant interdisciplinary research alliances and outreach activities that benefit rural education and rural communities
- To serve as an information clearinghouse on issues affecting rural education and rural communities
- To act as a convener and bridge between rural schools, and communities at local, State, tribal, and national levels.

2.2 Rutgers University

As part of Rutgers, CESP has access to a wide range of training and meeting facilities throughout the State. Rutgers University has five campuses located in New Brunswick/Piscataway area in central New Jersey. Each of these five campuses has a college center with multiple rooms having Internet connectivity, computer labs, and other conveniences of modern technology. The larger rooms in the five centers can accommodate up to 500 people. Each center also has a variety of smaller meeting rooms for smaller, more intensive training and work sessions.

Rutgers University has meeting space suitable for large-scale or multiple-group sessions on its campuses in two major urban centers: Newark, in the northern part of the State, and Camden, across the river from Philadelphia, in the southern half of the State. In addition, major university departments have meeting rooms and office space that offer conveniences similar to those of the college centers. All Rutgers University training and meeting facilities are readily accessible by mass transit and located near major highways.

Technology

Videoconferencing, the popular and effective way of conducting meetings involving participants not on site, is available at various Rutgers locations throughout the State. The four major classes of videoconferencing resources are:

- **Interactive Video Classrooms.** The university has several fully developed Interactive Video Classrooms on the Newark, Douglass, Livingston, College Avenue, and Camden campuses, and at off-campus locations including Freehold and Mt. Arlington.
- **Videoconference meeting rooms.** These smaller facilities than can accommodate between 6 and 12 meeting participants.
- **Video over IP Bridge.** This scheduling and hardware resource can bridge several videoconferencing sites, expanding the videoconference from point to point to many sites. This makes it possible for a video conference call to operate in the same way as a telephone conference call.
- **Web-based Videoconferencing.** This allows small client software to be downloaded to individual PCs equipped with a Web cam.

In addition to these videoconferencing resources, Rutgers assists in planning and development support for videoconferencing.

CESP is located at an off-campus site conveniently located next to a Route 287 exit. The offices include a professional development lab that can service up to 38 people, with a wide range of set-up capabilities. It is equipped with a wireless cart of PC and Mac laptops, two interactive SMARTBoards, video and digital cameras, wireless printers, an array of educational software, and VCR setup. The lab can support video conferencing over IP through the use of Web cams. The lab suite includes two additional breakout rooms. The CESP offices, located on a different floor, include a conference room and several other small breakout rooms.

2.3 Caliber

Caliber has 100,000 square feet of well-appointed professional office space, suitable for seminars, teleconferences, workshops, and other client meetings. Our Information Technology (IT) group provides technical and support services to Caliber staff and their clients, consulting on technical issues, evaluating and implementing new technologies, and designing and developing new applications. The IT group ensures that Caliber is providing state-of-the-art technologies for our clients and has state-of-the-art

equipment capabilities such as two relational database management systems; programming, statistical, and data visualization software; and knowledge management and collaboration software.

Our communication capabilities allow inbound and outbound communication with other computer systems within and outside the Federal government via several major networks, including our Microsoft Exchange e-mail system and the Internet. Caliber also owns cutting-edge Video Conferencing (VTC) systems and has outstanding computer printing capabilities, including high-speed, high-quality printers, such as HP Laser Jet 9000, Canon CLC3900+, and PostScript printers. These and other resources available to Caliber and the PSU team facilitate a cost-effective, timely execution of project objectives.

2.4 The Metiri Group

The Metiri Group leases an office at 600 Corporate Pointe, Suite 1180, Culver City, CA. The facilities are approximately 3,300 square feet. Included are seven offices, a conference room, a copier room with a leased copier, two office servers, three desktop computers, seven laptops, and a printer interconnected through CAT 5 and a wireless network. The Metiri Group holds a five-year lease on the premises (July 2003-2008). In addition, the Metiri Group co-locates two servers in St. Louis, MO where they host Web pages and provide online survey services.

2.5 Synergy Enterprises, Inc.

Synergy Enterprises, Inc. provides our clients with cutting-edge information technology (IT) solutions by embracing the most efficient technologies and software applications for database design and maintenance, Website development, custom Web and network applications, Webcasting services, video and audio teleconferencing, online registration, conference marketing, and e-learning services. SEI uses Oracle, SQL Server, Microsoft ACCESS, Microsoft Visual Basic, JavaScript, and Microsoft.NET in the design and creation of Internet-based survey data processing systems, Web portals, interactive conference Websites, and online peer review and grants management systems.

(b)(4)

Exhibit VI-1 provides a more detailed overview of our experience in each of these activities. Each project in the exhibit specifies the related tasks. Following the exhibit are abstracts that demonstrate our experience and expertise. These abstracts also tie the activities performed in the respective projects to the tasks and subtasks required by the REL.

Exhibit VI-1
Project Experience Chart

Project Title	Funding Agency	Training and Technical Assistance		Dissemination					Needs Assessment			Applied Research and Development							Evaluation Activities					Other				
		Technical Assistance	Professional Development	Publications	Presentations	Workshops	Conferences	Technical Reports	Surveys	Interviews	Focus Groups	Case Studies	Program Evaluation	Formative Evaluation	Summative Evaluation	Peer Review	Self-Evaluation	External Evaluation	Internal Evaluation	External Evaluation	Internal Evaluation							
Enhancing the Technological Preparation of Future Teachers in Pennsylvania	ED	X		X	X																	X	X	X	1, 4, 5			
William F. Goodling Institute for Research in Family Literacy	ED			X	X	X	X	X			X	X	X	X	X	X	X	X							X	1, 2, 4, 5		
Intelligent Tutoring	ED							X		X		X	X	X	X	X	X								X	2, 5		
Mid-Atlantic Center for Mathematics Teaching and Learning	NSF																								X	1, 3, 5		
Technology-Adept Teachers for Educational Reform Project	ED	X	X							X									X			X	X		X	1, 3, 5		
The Dream Deferred	ED (OERI)											X	X	X	X	X	X	X								X	2, 5	
Coalition of Essential Schools		X	X	X	X	X		X	X	X	X		X	X	X	X	X								X	X	1, 4, 5	
New Jersey Math and Science Partnership	NSF	X	X	X	X	X		X	X	X				X	X	X	X	X	X						X	X	1, 4, 5	
New Jersey GAINS Project	NJ DOE	X	X	X	X			X								X	X								X	X	1, 4, 5	
Bridging the Gap	Carnegie	X		X		X		X									X									X	1, 4, 5	
The What Works Clearinghouse	ED			X	X	X	X	X			X					X		X		X						X	2, 4, 5	
Children's Bureau Clearinghouse Services	CBACYF/ACF/HRHS			X	X	X	X	X								X										X	4, 5	
Analytical Support Program	NIJ			X		X		X	X	X		X	X	X	X	X	X	X							X		X	
Evaluation of the OMAP and OSCI Initiatives	DH DOE	X	X		X	X		X	X	X	X	X	X	X	X	X	X	X		X					X	X	1, 4, 5	
OETAG	ED	X	X	X		X	X	X	X	X	X	X	X	X	X	X	X	X							X	X	X	1, 4, 5
Statewide Evaluation of the NCLB Title IID Competitive Grant Programs	PA DOE	X	X					X	X	X		X	X	X	X	X	X	X								X	1, 2, 4, 5	
Program Evaluation and Quick Response	Chicago PS	X	X									X	X	X	X	X	X	X							X		1, 2, 5	
Framework, Data Analysis System, National Trends Report for NCLB IID	SETDA											X	X	X	X	X	X	X							X		1, 2, 5	
Program Evaluation of NCLB IID Grant	Clark Cty SD							X	X	X		X	X	X	X	X	X	X							X		1, 2, 5	
Preparing Tomorrow's Teachers for Technology Program	USF	X	X	X				X																	X	X	X	1, 2, 5
21st Century Community Learning Centers	OESE															X									X	X	X	1, 4, 5
Technical Support for Constituency Outreach and Research Dissemination	NIH (NIDA)	X	X	X				X								X			X						X	X	X	1, 4, 5
National Lender Training Conference	HUD (FHA)				X	X		X	X	X		X	X	X	X	X	X	X							X	X	X	1, 2, 3, 5
Teaching American History Evaluation	ED (OIE)	X	X	X		X	X	X	X	X	X	X	X	X	X	X	X	X							X		X	1, 5
Peer Reviews for Demonstration and Professional Development Grants	ED (OIE)									X															X		X	1, 3, 5

PROJECT SUMMARIES

The following work demonstrates PSU's experience with the utilization of existing research to design and implement training and develop and disseminate relevant curriculum and resources.

Enhancing the Technological Preparation of Future Teachers in Pennsylvania – PSU	
Client:	Pennsylvania Department of Education
Program Contact:	Michele Fry (b)(6)
Project Director:	(b)(4)
Grant Number:	1G4000007997
Period:	May 16, 2005 – June 30, 2005
Grant Value:	\$351,733
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 4, Subtask 4.1

Penn State's College of Education was awarded \$351,733 by the Pennsylvania Department of Education to coordinate a statewide effort to ensure that teachers who are recommended for certification in Pennsylvania have the knowledge and skills to use technologies effectively in their classrooms. The project, *Enhancing the Technological Preparation of Future Teachers in Pennsylvania*, was aimed at ensuring that the teachers are ready to develop and lead classrooms that are student centered, data informed, personalized, and results focused.

The project, which ran from 5/16/05 to 6/30/05, involved work to (1) design and implement a Technology and Teacher Education Summit for the leaders of teacher certification programs; (2) develop a Performance-Oriented Educator's Toolkit (POET) to support up to 20 teacher

education programs in Pennsylvania to transform their curriculum to require that students demonstrate skills and knowledge reflected in relevant standards; and (3) develop and acquire curriculum resources that assist Pennsylvania's institutions of higher education in preparing their graduates to use technologies effectively.

(b)(4)

The work conducted through this institute displays PSU's expertise in designing and carrying out research to produce informed conclusions on the effectiveness of educational programs. It is an example of a project where research findings are disseminated to practitioners and assistance is provided to agencies in the application of research.

William F. Goodling Institute for Research in Family Literacy – PSU	
Client:	U.S. Department of Education
Program Contact:	Michael Nugent (b)(6)
Project Director:	(b)(4)
Grant Number:	P116Z010028
Period:	April 1, 2001 - ongoing
Grant Value:	\$6,000,000
Relevant Tasks:	Task 1, Subtask 1.1; Task 2, Subtasks 2.1, 2.4, 2.5; Task 4, Subtasks 4.1, 4.2

Penn State's College of Education received funding in April 2001 to establish the William F. Goodling Institute for Research in Family Literacy. The mission of this ongoing initiative, funded by the U.S. Department of Education in the amount of \$6 million, is to improve family literacy education through research and its application to practice and professional development.

(b)(4)

The field of family literacy requires researchers to look beyond the traditional disciplines of early childhood education, elementary education, adult education, and parent education and family functioning. Research must focus on how each of these disciplines works together in family literacy settings. To address this need for multidisciplinary research and development, the Goodling Institute has established a research agenda for family literacy that helps policymakers make research-based decisions about these programs. Effective dissemination of Goodling Institute research findings also helps practitioners to develop professionally and apply research to improve practice at the local level.

Some of the Goodling Institute's ongoing research projects deal with adult participation related to outcomes in family literacy programs, the effect of participant characteristics, a survey of interactive parent child literacy activities in Pennsylvania family literacy programs, the impact of family literacy on children's development, and the Family and Child Education program that aims to develop a clear understanding of family literacy indicators of effectiveness.

The Goodling Institute has created an annotated bibliography of more than 170 research articles and writings on family literacy. The bibliography includes annotations created by the Institute as well as entries that were written in 2000 by the University of North Carolina with Federal funding sources. These annotations should be helpful not only to researchers and policy makers but also to practitioners in family literacy programs developing research-based practices.

The Goodling Institute works collaboratively with the College's ISAL and with the National Center for Family Literacy in Louisville, KY.

This project provides additional evidence of PSU's experience with developing and investigating the effectiveness of an educational program using rigorous experimental research design.

In August 2003, a team of researchers from Penn State University received a grant of \$1,222,818 from the U.S. Department of Education to develop further and investigate a program designed for middle school students to increase their reading comprehension skills. The project, *Intelligent Tutoring Using the Structure Strategy to Improve Reading Comprehension of Middle School Students*, runs from 8/15/2003 to 8/14/2006.

The project will develop a computer program to serve as an "intelligent tutor" and is based in part on past interactions involving retired community participants who tutored fifth-grade students in the structure strategy on the Internet.

Some students fail in identifying main ideas from expository text and giving cohesive and complete accounts of what they read because of how they read. The project addresses the national reading comprehension problem through Web-based intelligent tutoring using the structure strategy. The proposed project extends the research on text structures and the structure strategy to aid comprehension and recall of text, addresses use of technology in teaching reading, provides valid and reliable assessments of reading comprehension, and evaluates the effectiveness of an intelligent tutoring system in improving reading comprehension.

Intelligent Tutoring Using the Structure Strategy to Improve Reading Comprehension of Middle School Students - PSU

Client: U.S. Department of Education

Program Contact: Elizabeth Albro
(b)(6)

Project Director: (b)(4)

Grant Number: R305G030072

Period: August 15, 2003 - August 14, 2006

Grant Value: \$1,222,818

Relevant Tasks: Task 2, Subtasks 2.1, 2.4, 2.5

(b)(4)

This collaborative initiative involves the development of solutions that improve student achievement in school districts in the region.

Mid-Atlantic Center for Mathematics Teaching and Learning (MAC-MTL) – PSU	
Client:	National Science Foundation (NSF)
Project Officer:	John S. Bradley (b)(6)
Project (b)(4)	(b)(4)
Grant Number:	Z457901
Period:	August 1, 2000 – August 31, 2006
Subgrant Value:	\$3,234,624
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 3

A nationwide shortage of mathematics education professors prompted the National Science Foundation (NSF) to award a major competitive grant in 2000 to Penn State's College of Education and two other universities to establish a new Mid-Atlantic Center for Mathematics Teaching and Learning (MAC-MTL) in an effort to reverse the trend.

Penn State's mathematics education program received \$3,234,624 as a subgrant of the full \$9 million NSF grant through the University of Maryland. The project is funded from 8/1/00 to 8/31/06.

M. Kathleen Heid, professor of mathematics education at Penn State, is co-principal investigator for the three-university project. The University of Delaware is the third participating university. In addition, the program requires each participating university to establish a partnership with a regional school district. Penn State's partner is the Pittsburgh Public Schools.

(b)(4)

The mathematics education program at Penn State has been growing steadily since its inception in 1983, but in recent years it has shown remarkable strength in numbers and prestige. It is now one of the top 10 programs in the nation.

MAC-MTL was established when states were moving toward higher academic standards for all subjects, including mathematics. Currently, the nation is producing far fewer mathematics education professors than it needs. More than 200 mathematics professorships were available last year, yet the nation produced fewer than 100 qualified graduates. If the shortage continues, math instruction in public and private schools could falter.

The grant addresses two problems associated with the shortage. First, it provides substantial funding for graduate students in mathematics education. It supports 15 doctoral students at each of the three universities. Second, it seeks to improve the quality of education these future professors receive. The coordinated efforts are handled by a newly formed center that combines the resources of the three universities. Students have access to the best faculty and facilities of these three institutions.

Another part of the program is the development of courses with mathematics faculty. These courses will be designed to impart to mathematics educators the deep knowledge of mathematics that they will need to provide quality instruction to future mathematics educators. The grant also provides funding for research into how math educators learn and how they might use new technologies to improve math education.

This activity demonstrates Penn State's ability to manage a complex project involving multiple universities and to provide technical assistance to schools and universities.

In June 2001, Penn State's College of Education was awarded a four-year project from the U.S. Department of Education, *Technology-Adept Teachers for Educational Reform Project*. The \$710,916 initiative was established to formulate certification standards designed to help teachers from a variety of disciplines gain and demonstrate the ability to teach effectively with constantly changing technology. The project ran from 6/1/00 to 5/31/04.

The project addressed three important problems: preparing future teachers to use learning technologies effectively; modernizing the practices of tomorrow's teachers; and supporting teacher education faculty as they employ modern technologies and practices in their own classrooms.

The initiative worked toward achieving the goals of defining technology skills for 37 teaching roles; establishing a nationally recognized assessment and certification process; assisting teacher preparation programs to model technology-based learning experiences; developing technology-based tools to help teachers assess student technology competencies; and offering training, assessment, and support to other teacher preparatory programs.

The project's overall director was Kyle Peck, who, at the time of the project, was professor of instructional systems and currently is the College's Associate Dean for Outreach, Technology, and International Programs. He is proposed as project director for the Regional Lab proposal. Dr. Peck has a long record of successful research, development, and training projects, totaling more than \$2 million. Susan Land, assistant professor of instructional systems, served as the director of lesson development.

The partnership included three other universities—Austin Peay State University, Florida State University, and the University of Georgia—as well as the National School Boards Association, the Association for Educational Communications Technology, and the Agency for Instructional Technology.

Technology-Adept Teachers for Educational Reform Project – PSU	
Client:	U.S. Department of Education
Program Contact:	Lavona M. Grow (b)(6)
Project Director:	(b)(4)
Grant Number:	P342B000014
Period:	June 1, 2000 – May 31, 2004
Grant Value:	\$710,916
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 3

This project demonstrates Penn State's ability to conduct large-scale program evaluations on the effectiveness of educational programs.

In 2001, Penn State's College of Education received a \$690,071 grant from the U.S. Department of Education's Office of Educational Research and Improvement to study the relative and aggregate effects of the programmatic components of the GEAR UP initiative.

The GEAR UP Program, which stands for Gaining Early Awareness and Readiness for Undergraduate Programs, is a national 50-state effort to elevate the academic readiness for college of nearly a million low-income children and their families. The program funds partnerships of high-poverty middle schools, colleges and universities, community organizations, and businesses working with entire grade-level cohorts of students beginning in the 7th grade and continuing through high school. It is a leading example of a group of emerging K-16 efforts at systemic change to help at-risk children prepare for, enter, and complete college.

The Dream Deferred: Increasing the College Preparedness of At-Risk Students	
Client:	U.S. Department of Education, Office of Education Research and Improvement (OERI)
Project Officer:	Brend Wolff (b)(6)
Project Director:	(b)(4)
Grant Number:	R305T010167
Period:	January 1, 2001 – April 30, 2005
Grant Value:	\$690,071
Relevant Tasks:	Task 2, Subtasks 2.1, 2.4, 2.5

The grant, which ran from January 1, 2001, to April 30, 2005, was a longitudinal study, *The Dream Deferred: Increasing the College Preparedness of At-Risk Students*. The project director was Patrick T. Terenzini, professor and senior scientist in Penn State's renowned Center for the Study of Higher Education (CSHE). Dr. Terenzini will serve the Regional Lab as principal investigator and by collaborating on experimental designs by overseeing the quality of Task Two work. The longitudinal study capitalized on an intact GEAR UP database to monitor the college readiness of two cohorts of at-risk students in 164 partnerships. The research interest was in the effectiveness of an integrated, collaborative, K-16 approach and the activities and programs that comprise it.

The *Dream Deferred* longitudinal project capitalized on the GEAR UP partnerships' annual performance reports and on Web-based State testing data in a study of the relative (and aggregate) effects of GEAR UP's programmatic components on students' and parents' awareness of what will be needed for college enrollment and on students' readiness to enroll in and complete postsecondary degree programs. This research project focused not on GEAR UP per se, but on the effectiveness of the kinds of activities and programs GEAR UP embodies. GEAR UP constitutes a real-world practice and policy laboratory. The research is intended to identify practices and policies that involve multiple stakeholder groups at all levels of our K-16 educational system that promotes college success for low-income students. The study's overriding purpose has been to inform both practice among stakeholder-partners and policy at the State and Federal levels.

The study presented an unprecedented opportunity to utilize the GEAR UP database, providing an opportunity to analyze the individual and combined effects of different interventions on the college-going rate among disadvantaged students. It mirrored the CSHE's interest in studying student access to higher education and public policy development.

Caliber's partnership on the What Works Clearinghouse exemplifies the knowledge and skills necessary to identify and disseminate scientifically valid research findings on a variety of educational topics and interventions. The topic reviews conducted by Caliber staff demonstrate an understanding of rigorous research design and of applying the highest standards of research evidence to designate effective practices.

What Works Clearinghouse - Caliber	
Client:	U.S. Department of Education (UPENN/Campbell Collaborative and AIR, Prime Contractors)
Project Officer:	Robert Boruch (b)(6)
Project Director:	(b)(4)
Contract Number:	ED-02-CO-0022
Period:	August 2002 – August 2007 (includes all options)
Contract Value:	\$1,956,940 (current funding) \$2,399,305 (includes all options)
Relevant Tasks:	Task 2, Subtasks, 2.1, 2.2, 2.3, 2.5; Task 4, Subtasks 4.1, 4.2

The What Works Clearinghouse (WWC) was established in 2002 by the U.S. Department of Education's Institute of Education Sciences to provide educators, policymakers, researchers, and the public with a central and trusted source of scientific evidence of what works in education. With few extant reliable, evidence-driven resources to help education decision makers differentiate high-quality research on the effectiveness of interventions from weaker research and promotional claims, the WWC serves to designate programs and practices that meet high standards for effectiveness. Thus, the WWC will become a decision-making tool, helping the education community locate and recognize credible and reliable evidence to make informed decisions.

To create such a tool, the U.S. Department of Education has contracted with a team of research organizations and educational institutions to construct the national clearinghouse. To date, the project has developed a set of standards for assessing the evidence in studies

supporting the effectiveness of educational interventions, established a systematic process for conducting reviews, and completed an initial round of reports on middle school math. Caliber supports this team as a subcontractor by staffing review topics and developing and maintaining an evaluator registry of individuals and organizations prepared to conduct evaluations in accord with WWC standards. Topics for review include beginning reading, character education, early childhood education, elementary school math, English language learners, and dropout prevention.

On an ongoing basis, the What Works Clearinghouse teams of reviewers collect, screen, and identify studies of the effectiveness of educational interventions (programs, products, practices, and policies). The review begins by selecting the discrete interventions within a broad topic and then assembling the available studies associated with the discrete intervention. Studies that pass the initial screens for relevance and identifiable outcomes are reviewed for having the strongest design, based upon the strengths and weaknesses in the studies against the WWC Standards. The study results are carefully recorded and become the basis of a series of intervention reports providing full transparency of the study reviews. Intervention reports within a broad topic area will be summarized in future topic reports. Caliber is providing staff to all topic reviews, and leadership roles for selected topics. The reports when completed will be posted on the WWC Website www.whatworks.ed.gov.

The following project demonstrates effective collection, synthesis, and dissemination of information on evidence-based policies, programs, and practices.

In 2001, Caliber was awarded a five-year contract with the Children's Bureau to operate two national clearinghouses—the National Clearinghouse on Child Abuse and Neglect Information and the National Adoption Information Clearinghouse. Clearinghouse staff connect professionals and concerned citizens to timely and well-balanced information on programs, research, legislation, and statistics regarding the safety, permanency, and well-being of children and families. The vision for the Clearinghouse is to *Provide Gateways to Information: Protecting Children and Strengthening Families*.

The Clearinghouses cover information on child abuse and neglect, child welfare, and adoption, and they serve a wide continuum of professional constituents. Clearinghouse customers are provided customized resources, information services, and options for accessing information in variety of formats (e.g., Web, electronic digest, e-lets, print products, information packets). The Clearinghouse utilizes a variety of technology tools to organize and disseminate information, including a number of databases that automate the provision of current information.

We are strategically focused on leading the way in developing or pointing to new outcomes-focused knowledge for the child welfare field—and thus fill a vital need in the current environment of rapid systemic change. Clearinghouse staff collect, synthesize, and disseminate information on policy, program, and evidence-based practice that have been demonstrated to be effective through research and evaluation. Strategic partnerships with key national organizations assist us in the development of evidence-based information desperately needed by professionals in the field. Partnerships with national organizations also help us to connect professionals with one another on topics of common interest and assist the clearinghouse in disseminating information widely to professionals and community groups across the nation.

Children's Bureau Clearinghouse Services – Caliber	
Client:	Children's Bureau/ACYF/ACF/HHS
Project Officer:	LaChundra Thomas (b)(6)
Project Director:	(b)(4)
Contract Number:	GS23F8062H 01Y00156301D
Period:	September 2001 – September 2006
Contract Value:	\$24,454,259
Relevant Tasks:	Task 4, Subtasks 4.1, 4.2

In addition to highlighting expertise in providing a variety of quick-turnaround, analytic services under a single contract vehicle, this work demonstrates Caliber's familiarity with designing and conducting applied research including needs assessments, evaluations, and secondary data analyses.

Caliber has twice been awarded a multi-year task order contract to provide research and analytic support services to the National Institute of Justice (NIJ) and its partner agencies. Through 17 task orders on the original contract and 5 task orders on the current contract, Caliber has synthesized critical research findings and assessed implications for future policy, practice, and research. Many task orders involve quick-turnaround products to enable government agencies to respond quickly to emerging issues. Examples include:

Needs Assessment for Service Providers and Trafficking Victims. Caliber conducted a needs assessment on the special needs of trafficking victims and the service providers. The assessment asked three questions: What services currently exist for trafficking victims? How responsive are existing services to victim's needs? What additional services do victims need? Caliber conducted a telephone survey with victim service providers and on-site interviews and focus groups on key service delivery issues. This quick-turnaround needs assessment was used to develop effective demonstration projects.

Estimating Human Trafficking: Development of a Methodology. Caliber is developing a methodology to generate credible and reproducible estimates of the magnitude of human trafficking into the U.S. in two critical regions. The objectives are to: conduct a targeted literature review on existing trafficking models; identify relevant data sources for the two regions and collect additional data from key stakeholder interviews; develop two trafficking models; and generate initial estimates by testing the model.

Assessment of the Evaluation Potential of the Victim Services 2000 Program. Interested in whether demonstration projects were improving the range, quality, and accessibility of services for victims of crime, NIJ and the Office of Justice Program's Office of Victims of Crime turned to Caliber to provide evaluation planning services. Caliber conducted a quick-turnaround (60-day) evaluability assessment of the Victim Services 2000 program and then explored the feasibility of an evaluation, identifying research questions, data sources, practical evaluation design options, and cost estimates.

Estimate of Drug Court Recidivism Rates. Widely varying reported rates of recidivism from drug court outcome evaluations contribute to a debate over the effectiveness of drug courts. Caliber and its subcontractor, the Urban Institute, generated estimates of drug court recidivism rates across drug courts for selected subgroups of graduates during the first and subsequent years after graduation. Major tasks included: sampling drug courts, conducting telephone interviews for drug court graduate information, obtaining recidivism data from the FBI's NCIC database, analyzing data, and presenting the results in a written report.

Analytical Support Program (ASP) BPA - Caliber	
Client:	U.S. Department of Justice, Office of Justice Programs
Contracting Officer:	Raymond German (b)(6)
Project Director:	(b)(4)
Contract Numbers:	OJP-99-C-010 (Completed Contract); GS-23F-8062H PO #2004BF016 (Current Contract)
Period:	August 1999 – February 2005 (Completed Contract); June 2004 – June 2009 (Base plus 4 option years)
Contract Value:	\$1,603,604 (Completed Contract); \$973,229 (value to date); \$7,500,000 (contract ceiling)
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 2, Subtasks 2.2, 2.4

In addition to demonstrating experience conducting state-wide evaluations using a variety of data collection techniques, this work illustrates Caliber's familiarity with best practices research in teacher professional development.

This project evaluates the effectiveness of the Ohio Mathematics Academy Program and the Ohio Science Institutes professional development initiatives, designed to improve Ohio teachers' knowledge and skills relative to effective classroom mathematics and science instruction. Evaluation results will be used to:

- Provide feedback to curriculum developers and trainers to improve the effectiveness of the actual professional development sessions
- Verify that teachers are learning the intended knowledge and skills
- Determine the effectiveness and impact of professional development on the extent and quality of implementation of new strategies in the classroom
- Identify challenges that teachers encounter when transferring knowledge from professional development into classroom practice.

EVALUATION OF THE OHIO MATHEMATICS ACADEMY PROGRAM AND THE OHIO SCIENCE INSTITUTE INITIATIVES - CALIBER	
Client:	Ohio State Department of Education
Project Officer:	Lucy Seabrook (b)(6)
Project Director:	(b)(4)
Contract Number:	Purchase Order No.: EDU 9336OU
Period:	July 2004 – June 2007
Contract Value:	\$1,600,000
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 2, Subtasks 2.4, 2.5

Numerous data collection activities, yielding a variety of data, will be used to help the Ohio Department of Education make data-based decisions about the institutes. Data collection activities include assessments of teacher content knowledge in mathematics and science; observations of professional development institutes; interviews with, and surveys of, trainers and teachers; interviews with the curriculum developers; and, through classroom observation, assessments of the extent to which knowledge gained at the institutes is incorporated into the teachers' instructional practices.

This collaborative project illustrates Caliber's capability to conduct needs assessments, develop and deliver technical assistance, and provide broad-based dissemination services using a Web site, publications, and written reports. It also demonstrates Caliber's knowledge of, and expertise in, character education in schools.

Character Education and Civic Engagement Technical Assistance Center (CETAC) – Caliber	
Client:	Department of Education
Project Officer:	Paul Kesner (b)(6)
Project Director:	(b)(4)
Contract Number:	MOBIS GS-23F-8062H ED-03-PO-2981
Period: 2004	September 2003 – November
Contract Value:	\$727,340
Relevant Tasks:	<i>Task 1, Subtasks 1.1, 1.2; Task 3; Task 4, Subtasks 4.1, 4.2</i>

Funded by the Office of Safe and Drug Free Schools in the Correctional and Character Education Group, CETAC was the first of its kind. A primary goal of CETAC was to provide training and technical assistance to ED grantees and to ensure the discovery and effective dissemination of identified best practices. Caliber worked in partnership with the Association for Supervision and Curriculum Development (ASCD), the most prominent teacher professional development organization in the U.S., and the Character Education Partnership (CEP), the leading organization in the field of character education. Together, this dynamic team focused on key issues in character education such as:

- Assessing the needs of the grantee community
- Developing and delivering training and technical assistance to grantees
- Developing a multi-faceted Web site for communication, dissemination and clearinghouse functions
- Developing and disseminating a variety of publications such as fact sheets, multi-page brochures on urgent issues, a report reviewing the status of grantee efforts, and a monograph that presented the state-of-the-art in character education, civic engagement, and service learning
- Convening and facilitating meetings of grant evaluators and national leaders in the field
- Developing and coordinating speaker sessions for ED staff to develop their capacity in this work.

The following work demonstrates SEI's ability to win large-scale logistical contracts involving planning, coordination, and material preparation for conferences and training workshops.

The focus of the 21st Century Community Learning Centers program, within the Office of Elementary and Secondary Education, is to provide expanded academic enrichment opportunities for children attending low-performing schools. Tutorial services and academic enrichment activities are designed to help students meet local and state academic standards in subjects such as reading and math.

Logistical and Administrative Support for the 21st Century Community Learning Centers Program – Synergy	
Client:	U.S. Department of Education (ED)/Office of Elementary and Secondary Education.
Project Officer:	Peter Eldridge, ED (b)(6)
Project Director:	(b)(4)
Contract Number:	ED-04-CO-0076
Period:	March 8, 2005 – March 7, 2009
Contract Value:	\$1,813,973
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 3

SEI will provide preconference, onsite services and postconference services for the annual Summer Institute, which will bring together 2,100 grantees for intensive training sessions. SEI will also provide speakers and vendor support for about 100 sponsored speakers and 60 exhibitors. Conference professionals will:

- Select and negotiate hotel contract including overflow property
- Prepare and produce conference materials (bags, pins, agendas, folders, etc.)
- Conduct online registration and design and maintain grantee database
- Provide note taking, summary writing, meeting documentation, and publication services
- Provide graphic design services and write and edit conference materials
- Make lodging and travel arrangements for speakers
- Identify and coordinate all vendor and exhibitor requirements
- Identify subject-matter consultants/speakers and arrange for audiovisual services
- Reconcile all hotel and vendor bills
- Provide evaluation results for the conference, and provide final closeout report.

This contract further demonstrates SEI's expertise in providing logistical support and meeting management services for large, high-profile conferences.

Technical Support for Constituency Outreach and Research Dissemination - Synergy	
Client:	National Institutes of Health (NIH)/National Institute on Drug Abuse (NIDA)
Project Officer:	Jane Holland (b)(6)
Project Director:	(b)(4)
Contract Number:	N01DA-4-1114
Period:	May 2004-May 2007
Contract Value:	\$2,998,759
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 3

The mission of the National Institute on Drug Abuse (NIDA) is to lead the nation in bringing the power of science to bear on drug abuse and addiction. The Office of Science Policy and Communications administers several Institute-wide programs focused on this mission and requires the ability to conduct meetings and workshops in a variety of Institute-wide areas.

This contract requires provision of all logistical support and meeting management services for large, high-profile conferences for NIDA, including coordination of activities with nongovernment organizations to arrange for constituent-related collaborations and dissemination. An electronic constituent database must be updated quarterly and publications and dissemination services provided for the NIDA Connector, a semi-monthly newsletter. SEI staff provided all pre- and postconference support for the "Blending Clinical Practice and

Research: Forging Partnerships to Enhance Drug Addiction Treatment" meeting in September 2004, in Detroit, MI, for 900 participants. SEI provided similar services for a 700-person conference in June 2005 at Miami Beach, FL, "Smart Practice, Practical Science: Blending Treatment and Research." Under the contract, SEI is working with more than two dozen NIDA constituent organizations by sponsoring constituents' annual meetings—including coordinating invitations to research events and meetings—and assisting organizations in designing and producing drug addiction publications highlighting NIDA's ongoing research.

NIDA has exercised its second option year for this contract and awarded SEI another sole source 3-year (\$3,000,000) contract to continue its services.

(b)(4)



This work illustrates SEI's capability to provide methodological and technical assistance using a variety of modalities including publications, direct communication, review and recommendations, telephone consultations, over the Internet, and through teleconferences and videoconferences.

Teaching American History Evaluation, Technical Assistance, and Training - Synergy	
Client:	U.S. Department of Education (ED)/Office of Innovation and Improvement (OII)
Project Officer:	Desandre Woodard (b)(6) Harry Kessler (b)(6)
Project Director:	(b)(4)
Contract Number:	ED-04-CO-0156
Period:	September 2004 – September 2009
Contract Value:	\$1,403,158
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2

The Teaching American History (TAH) Grants Program is a discretionary grant program funded under Title II-C, Subpart 4, of the Elementary and Secondary Education Act. Federal funding is provided to local educational agencies to promote the teaching of traditional American history in elementary and middle schools as a separate academic subject.

SEI will assist grantees in implementing experimental or quasi-experimental evaluations of the impact of their educational interventions of TAH on teacher performance and student achievement. The assistance will include refinement of evaluation designs, collection of evaluation data, and analysis of evaluation data. SEI will provide the assistance through a Grantee Guide and brochure available to the TAH grantees; by direct communication with grantees via written reviews and recommendations, telephone consultations, and over the Internet; and through a series of teleconferences or

videoconferences with teams of grantees experiencing similar challenges as they implement their evaluations. SEI will also establish and maintain a Web site to track the type of assistance provided to grantees, maintain grantee profiles, answer frequent questions, and provide evaluation instruments and other resources collected to assist the grantees. Throughout this effort, SEI will work closely with ED to maintain regular communication and meet deadlines for submissions of materials and reports.

(b)(4)



The following project demonstrates effective training/technical assistance and dissemination of information on policy, program, and evidence-based practice.

Coalition of Essential Schools – New Jersey – Rutgers University	
Client:	
Project Officer:	Anthony Campisi (b)(6)
Project Director:	
Grant Number:	
Period:	July 2002 – June 2006
Grant Value:	\$2,669,200
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 4, Subtasks 4.1, 4.2; Task 5

Founded in 1994 at Rutgers University, The Coalition of Essential Schools – New Jersey (CES-NJ) has represented the interests of more than 53,000 students in 70 schools in 22, mostly poor, districts across the State. Six years ago, the N.J. Supreme Court ordered that every school in the State’s poorest districts must select a national research-based model to provide assistance and guidance toward school improvement. The Coalition of Essential Schools was named by the N.J. Department of Education, based on evidence of impact, as one of only a handful of models approved for selection by all levels of schools, K-12, in the poor districts.

The mission of the CES-NJ is to advance high achievement and deep understanding among *all* students by supporting school efforts to put the Coalition’s Ten Common Principles into practice. The Coalition’s Common Principles challenge teachers, administrators, and members of the

community to identify their needs and priorities, then redesign their school curriculum, instruction, assessment, and organizational structures so students are actively working and using their minds well. CES-NJ helps schools enhance teaching and learning, refashion organizational design, and develop ways of personalizing and creating meaningful community connections so students are known, nurtured, and challenged. Individual schools choose the programs best suited to their students, faculty, and community. Many CES-NJ schools are making sound progress toward increasing student proficiency as measured by State tests, and there is much work remaining even in schools that demonstrate achievement relative to similar schools. CES-NJ has been a helpful partner to, and resource for, schools in the improvement process and moving *all* students to proficiency.

A notable recognition of the effectiveness of our technical assistance is the district of Paterson’s decision this month to eliminate all whole school reform providers that had been working in its schools except for CES-NJ. CES-NJ is to be Paterson’s sole provider and comprehensive school reform partner. Overall, since 2002, CES-NJ will have served 34 elementary and middle schools, 4 high schools, and 22 small academies in the district of Paterson, totaling \$2,669,200 worth of services.

In addition to demonstrating capability to provide effective technical assistance and professional development services, this work illustrates Rutgers' knowledge of, and expertise in, strategic planning, partnership building, and curriculum development.

The Math and Science Partnership (MSP) enacts a portion of the President's vision enunciated in No Child Left Behind, to strengthen and reform PreK-12 education. The program seeks to enhance student achievement in mathematics and science through support of partnerships between school practitioners and science, mathematics, engineering and education faculties of colleges and universities.

The purpose of the MSP award is to increase student achievement in 12 small- and medium-sized urban school districts with high levels of poor, minority and low-achieving student populations. The MSP has sought to increase achievement and reduce achievement gaps in math and science for all preK-12 students in partner school districts by:

New Jersey Math and Science Partnership – Rutgers University	
Client:	National Science Foundation
Project Officer:	James E. Hamos (b)(6)
Project (b)(4):	(b)(4)
Contract Number:	HER 0226989
Period:	October 2002-September 2005
Contract Value:	\$1,746,056
Relevant Tasks:	Task 1, Subtask 1.1; Task 4, Subtasks 4.1, 4.2; Task 5

- Working to develop and implement strategic plans for each district
- Working to develop internal leadership structures and practices to carry out the strategic plans
- Providing well designed, continuing professional development.

In addition, the MSP has increased and sustained the number of quality and diverse preK-12 teachers of math and science in partner school districts by:

- Providing potential teaches with experiences that have helped them see teaching as an attractive career
- Improving pre-service teachers' content knowledge by reshaping university math and science courses
- Carrying out induction programs for new middle and high school teachers.

The lead partner in the MSP is Rutgers University, and additional partners include Ashbury Park, Bound Brook, Bridgeton, Millville, New Brunswick, Phillipsburg, Plainfield, Roselle, South Bound Brook, Toms River, Union City, and Vineland School Districts as well as Kean University and Rowan University.

This work illustrates Rutgers' experience with developing resources on curriculum standards, implementing workshops for parents and teachers, and designing a dissemination system.

The New Jersey State Department of Education funded the GAINS (formerly FANS) Project in Language Arts Literacy during the 1999-2000 academic year. The project supports the development of workshop materials and procedures designed to acquaint parents with the Core Curriculum Content Standards for Language Arts Literacy and inform them of how they can help their children achieve these standards. The project also outlined plans to disseminate the workshop throughout the State and to develop a companion component for professional development for K-12 teachers.

Key activities included:

- Dissemination of the family GAINS program and material through a district-by-district approach within the State of New Jersey
- Design and dissemination of a GAINS program for K-12 teachers
- Creation and expansion of a GAINS Web site to serve both families and teachers.

New Jersey GAINS Project – Rutgers University	
Client:	New Jersey State Department of Education
Project Officer:	
Project Director:	(b)(4)
Grant Number:	4-28369
Period:	September 2000-September 2002
Grant Value:	\$291,179
Relevant Tasks:	Task 1, Subtask 1.1; Task 4, Subtasks 4.1, 4.2; Task 5

The following work demonstrates Rutgers' experience with the dissemination of scientifically valid research findings on closing the achievement gap in American education.

This book was part of an outreach program designed to synthesize and publicize research-based evidence and best practices concerning the reduction of disparity in literacy achievement between poor, minority, and English language learning children and their counterparts. The project also involved the development and implementation of a professional institute and a series of individual presentations to a variety of audiences responsible for the educational welfare of American's children. This project was a natural extension of the original grant, which focused on assisting teachers with teaching reading more effectively.

The book is designed for use as co-textbook in literacy education courses at the pre-service and in-service levels. At the pre-service level, it supplements existing textbooks that only touch on issues related to the achievement gap in a tangential manner. At the graduate level, this volume provides an up-to-date reference for professional development and a tool for hands-on use in the classroom.

Bridging the Gap- Improving Literacy Learning for Pre-Adolescent and Adolescent Learners Grades 4-8- Rutgers University	
Client:	Carnegie
Project Officer:	
Project Director:	(b)(4)
Contract Number:	426631
Period:	July 2000-December 2002
Contract Value:	\$207,378
Relevant Tasks:	Task 1, Subtask 1.1; Task 4, Subtasks 4.1, 4.2; Task 5

This work demonstrates Metiri Group's experience and expertise in providing technical assistance and building capacity with States and LEAs in the area of program evaluation; and designing and conducting formative and summative evaluations of a State level Federal program.

Statewide Evaluation of the No Child Left Behind Title II D Competitive Grant Programs in Pennsylvania – Metiri Group	
Client:	Pennsylvania Department of Education
Project Officer:	Monique Williams (b)(6)
Project Director:	(b)(4)
Contract Number:	#FC400006435
Period:	June 1, 2004 – October 30, 2006
Contract Value:	\$664,000
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 2, Subtasks 2.4, 2.5; Task 4; Subtask 4.1

The Pennsylvania Department of Education awarded a competitive contract to the Metiri Group to conduct the statewide evaluation for the NCLB Title II D competitive grants for 2002-2006 and to provide local evaluators with technical assistance for the 2004-2006 cycles. Metiri Group conducted a retrospective evaluation of the grantees for 2002-2004, using data collected by the Pennsylvania Department of Education, self reports from the grantees, phone interviews of select grantees, and PSSA scores for the participating schools.

The design for the 2004-2005 grantees included Metiri-generated data collection, including a series of teacher and administrators surveys, site visitations, and self-reports that together provide profiles of the school and district technology use and technology readiness, as well as trend data on implementation, and summaries of

local evaluation results.

The work of the evaluation team for the statewide evaluation of the Pennsylvania NCLB II D competitive grants includes:

- Working closely with the Pennsylvania Department of Education in the scheduling of data collection, technical assistance, and reporting to meet local, State, and Federal requirements.
- Providing formative recommendations for program improvements at the State level for NCLB II D in Pennsylvania (e.g., the PA Department of Education is funding a Cohort of NCLB II D districts to conduct quasi-experimental design impact studies as a result of a Metiri recommendation). Analyze multiple data sets on the NCLB II D Pennsylvania LEAs, summarize findings, generate recommendations based on the data and on the extensive background of Metiri partners in learning, technology, and policy. Information about the awarded projects will be analyzed to identify characteristics of funded projects, common activities and challenges, and innovative and effective practices.
- Collecting data through teacher surveys, principal surveys, and site visits to a stratified random sampling of schools. Training site visitors in a Metiri-developed protocol to ensure inter rater reliability. Included provision of a Web-based survey that enables schools to view their data online, compare trends across years, and export raw data sets for analysis.
- Capacity building and support for a cohort of LEA grantees, enabling them to design, implement, and report research findings about their NCLB IID intervention.

- Conducting regional symposium for grantees in ways that increase the quality of the evaluations conducted by local evaluator.

This work demonstrates Metiri Group's expertise in delivering fast response technical assistance and program evaluation to a large urban LEA.

Program Evaluation and Quick Response for Chicago Public Schools NCLB II D – Metiri Group	
Client:	Chicago Public Schools
Project Officer:	Sharnell Jackson (b)(6)
Project Director:	(b)(4)
Contract Number:	Board Report 04-0922-PR10
Period:	December 2003 – June 2005 (includes all options)
Contract Value:	\$401,500 \$451,498 (includes all options)
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 2, Subtasks 2.1, 2.4, 2.5

The Chicago Public Schools, through a competitive grant process, awarded Metiri Group a two-year contract to conduct program evaluation and strategic planning consultation for the competitive grant award to CPS from the Illinois State Board of Education for NCLB II D.

Because Chicago used those funds to support basic professional development services to low-performing schools plus a host of other programs, Metiri Group provided a range of services, including fast response support for research reviews of software and online resource requests CPS received from their building.

Chicago used the Metiri analysis to help determine which programs were working and would be continued, which would not be continued.

Under this contract, the Metiri Group provided the following services:

- Provided formative and summative evaluation of the Chicago Public Schools implementation of their 2003-2004 and 2004-2005 NCLB II D competitive grant program.
- Collected and analyzed data about the schools impacted by Chicago Public Schools NCLB II D competitive grant program. Provided trend data over time on the use of technology to improve student achievement.
- In response to the Federal requirement for evidence-based decision-making, CPS secured services from Metiri Group to conduct quick response reviews of research on software, Web-based learning products, and other technology-based services their schools identified for purchase through these funds.
- Conducted an experimental design study in Chicago in which three technology-based early literacy programs were compared to a control group with respect to impact on student reading levels as measured by Diebels.

This work demonstrates Metiri Group's expertise in developing national frameworks for assessing effective technology use in States and LEAs, and for producing policy reports on Federal programs.

Effective Technology Use Framework, Data Analysis System, National Trends Reports for NCLB II D – Metiri Group	
Client:	SETDA (State Educational Technology Directors Association)
Project Officer:	Melinda George (b)(6)
Project Director:	(b)(4)
Contract Number:	Dated, Not Numbered
Period:	October 2002 – January 2006 (includes all options)
Contract Value:	\$16,000 (current funding) \$247,816.00 (includes all options)
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 2, Subtasks 2.4, 2.5

The SETDA (State Educational Technology Directors Association), using primarily funds from the U.S. Department of Education, contracted with the Metiri Group to design a framework for the effective use of technology aligned to the Federal No Child Left Behind, Title II D federal program. The intent was to establish core data elements that all States should collect to enable parallel reports from States on NCLB II D.

Metiri Group worked with SETDA committees of State technology directors to develop that framework. Through subsequent contracts SETDA contracted Metiri to develop and field test a suite of assessment tools aligned to the framework and to conduct a national survey of NCLB II D state programs and report results in a policy report on National NCLB II D Trends.

Metiri provided the following services to SETDA:

- Development of a national framework for the effective use of technology in schools. This framework was aligned to the NCLB II D federal legislation and developed with oversight by a SETDA committee of State technology directors (www.setda-peti.org).
- Development of a suite of tools (teacher surveys, school administrator surveys, site visitation protocols) to collect and analyze data to inform school district and State status related to the SETDA framework. Validity and reliability studies were conducted to ensure a degree of confidence that the survey results correlated strongly with the site visitation results. (See www.setda-peti.org).
- Design and conducting of a national survey of NCLB II D State programs for formula and competitive grants under the NCLB IID Federal program. Collect data online through surveys of State technology directors, analyze data and report results through an annual National Trends report, published by SETDA. NOTE: National Trends Reports have been published for FY2002 and 2003, and the data collection is underway for FY2004. These reports have been used in over 50 briefings and hearing with Congressional members.

This work demonstrates Metiri's expertise in working with a large, metropolitan school district in a program review and impact study related to an NCLB II D grant

Program Evaluation of NCLB II D Grant – Metiri Group	
Client:	Clark County School District, Las Vegas, NV
Project Officer:	Christy Falba (b)(6)
Project Director:	(b)(4)
Contract Number:	PS-03-46
Period:	March 2003 – June 2004
Contract Value:	\$140,000 (includes all options)
Relevant Task:	Task 1, Subtasks 1.1, 1.2; Task 2; Subtasks 2.4, 2.5

The Clark County School District contracted with Metiri Group to conduct a program review of their professional development component of the NCLB II D grant for FY 2003; and to conduct a research study on a specific intervention's impact on learning. The school district used the study's recommendations as formative data for program improvement and as a summative report on their use of Federal funds.

Metiri Group provided the following consultative services through the contract:

- Development of instruments and protocols customized to the Clark County School District implementation of NCLB II D funds.
- Analysis of data on the professional development components of formula and competitive grant program for NCLB II D. Information about the professional development program, including common activities and challenges, and innovative and effective practices, was reported, along with impact on teacher practices and associated trends in student learning.
- Design and conducting of a quasi-experimental design study of the impact of the use of electronic concept maps.

This work demonstrates Metiri Group's expertise in working with university faculty to build their capacity in using technology in teacher preparation programs.

Design and Capacity Building for a Preparing Tomorrow's Teachers for Technology Program - Metiri Group	
Client:	University of South Florida
Project Officer:	Brian Curry (b)(6)
Project Director:	(b)(4)
Contract Number:	Sub Agreement # 1777-0047-00-A
Period:	January 2002-June 2005 (includes all options)
Contract Value:	\$150,000 (includes all options)
Relevant Tasks:	Task 1, Subtasks 1.1, 1.2; Task 4, Subtask 4.1, 4.2

The University of South Florida contracted with the Metiri Group to provide a program that would build the capacity of College of Education faculty to use technology effectively in preservice programs. The Preparing Tomorrow's Teachers Through Technology Federal program was intended to integrate technology into teacher preparation programs. As such, the program provided professional development for cohorts of USF College of Education faculty over the course of a year. It provides faculty with research and best practices and opportunities to build an individual action plan to integrate technology into specific preservice courses and field experiences.

The Metiri Group provided the following services throughout the term of this contract:

- Designed a yearlong professional development program for college faculty to integrate

technology into their methods courses.

- Provided a foundation of research and best practices in the field of educational technology upon which faculty can base their technology integration work.
- Provided periodic, ongoing professional development for each cohort of college faculty to guide their development in the integration of technology into methods courses.
- Built the capacity of the USF College of Education leadership team to commit to the integration of technology across the College of Education.

VII. SMALL BUSINESS SUBCONTRACTING PLAN

SMALL BUSINESS SUBCONTRACTING PLAN

DATE OF PLAN: (b)(4)

CONTRACTOR: Pennsylvania State University

ADDRESS: Office of Sponsored Research

110 Technology Center Building, University Park, PA 16802

DUN & BRADSTREET NUMBER: 003403953

SOLICITATION OR CONTRACT NUMBER: ED-05-R-0006

ITEM/SERVICE (Description): M-CARE: The Mid-Atlantic Collaborative for Applied Research in Education – TASKS 1-5

TOTAL CONTRACT AMOUNT (Breakout Options): \$ _____ \$ _____
Base year or Multi-year amount Option #1 (If applicable)

\$ _____ \$ _____ \$ _____
Option #2 (If applicable) Option #3 (If applicable) Option #4 (If applicable)

TOTAL MODIFICATION AMOUNT, IF APPLICABLE \$ NA

TOTAL TASK ORDER AMOUNT, IF APPLICABLE \$ NA

PERIOD OF CONTRACT PERFORMANCE (Month, Day & Year): (b)(4)

The following is a suggested model for use when developing subcontracting plans as required by P.L. 95-507 and implemented by Federal Acquisition Regulations (FAR) Subpart 19.7. While this model plan has been designed to be consistent with statutory and regulatory requirements, other formats of a subcontracting plan may be acceptable; however, failure to include the essential information as exemplified in this model may be cause for either a delay in acceptance or the rejection of a bid or offer when a subcontracting plan is required. Further, the use of this model is not intended to waive other requirements that may be applicable under statute or regulation. "SUBCONTRACT," as used in this clause, means any agreement (other than one involving an employer-employee relationship) entered into by a federal Government prime contractor or subcontractor calling for supplies or services required for performance of the contract or subcontract.

1. Type of Plan (check one)

Individual plan (all elements developed specifically for this contract and applicable for the full term of this contract)

Master plan (goals developed for this contract; all other elements standardized and approved by a lead agency Federal Official; must be renewed every three years and contractor must provide copy of lead agency approval)

Commercial product/service plan (contractor sells large quantities of off-the shelf commodities to many Government agencies. Plans/goals negotiated on a company, division, plant or product line basis reflecting projected annual sales for commercial and non-commercial items. Must be renewed annually and contractor must provide copy of lead agency approval).

2. Goals – Base Year

State separate dollar and percentage goals for Small Business (SB), Small Disadvantaged Business (SDB), Woman-owned Small Business (WOSB), Historically Underutilized Business Zone (HUBZone) Small Business, Veteran-owned Small Business (VOSB), Service Disabled Veteran-owned Small Business (SDVOSB) and "Other than small business" (OTHER) as subcontractors, for the base year and each option year, as specified in FAR 19.704 (break out and append option year goals, if applicable) or project annual subcontracting base and goals under commercial plans.

a. Total estimated dollar value* of ALL planned subcontracting i.e., with ALL types of concerns under this contract is \$ _____ (b + h = a)

b. Total estimated dollar value* and percent of planned subcontracting with SMALL BUSINESSES (including SDB, WOSB and HUBZone, SDVOSB and VOSB): (% of "a") \$ _____ and 29%. This represents 20% of the total contract amount (excluding award fee).

c. Total estimated dollar value* and percent of planned subcontracting with SMALL DISADVANTAGED BUSINESSES: (% of "a") \$ 0 and 0%. This represents 0% of the total contract value.

d. Total estimated dollar value* and percent of planned subcontracting with WOMAN-OWNED SMALL BUSINESSES: (% of "a") \$ _____ and 29%. This represents 20% of the total contract amount (excluding award fee).

e. Total estimated dollar* and percent of planned subcontracting with HUBZone SMALL BUSINESSES: (% of "a") \$ _____ and 0%. This represents 0% of the total contract amount.

f. Total estimated dollar* and percent of planned subcontracting with VETERAN-OWNED SMALL BUSINESSES: (% of "a") \$ _____ and 0%. This represents 0% of the total contract amount.

*The Business Proposal contains a small business subcontracting plan with dollar values.

g. Total estimated dollar* and percent of planned subcontracting with SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0 %. This represents 0 % of the total contract amount.

h. Total estimated dollar* and percent of planned subcontracting with "OTHER THAN SMALL BUSINESSES:" (% of "a") \$ _____ and 71%. This represents 50% of the total contract amount (excluding award fee).

2. Goals – Option Year 1

State separate dollar and percentage goals for Small Business (SB), Small Disadvantaged Business (SDB), Woman-owned Small Business (WOSB), Historically Underutilized Business Zone (HUBZone) Small Business, Veteran-owned Small Business (VOSB), Service Disabled Veteran-owned Small Business (SDVOSB) and "Other than small business" (OTHER) as subcontractors, for the base year and each option year, as specified in FAR 19.704 (break out and append option year goals, if applicable) or project annual subcontracting base and goals under commercial plans.

a. Total estimated dollar value* of ALL planned subcontracting i.e., with ALL types of concerns under this contract is \$ _____ (b + h = a)

b. Total estimated dollar value* and percent of planned subcontracting with SMALL BUSINESSES (including SDB, WOSB and HUBZone, SDVOSB and VOSB): (% of "a")
\$ _____ and 32%. This represents 23% of the total contract amount (excluding award fee).

c. Total estimated dollar value* and percent of planned subcontracting with SMALL DISADVANTAGED BUSINESSES: (% of "a")
\$ _____ and 0%. This represents 0 % of the total contract amount.

d. Total estimated dollar value* and percent of planned subcontracting with WOMAN-OWNED SMALL BUSINESSES: (% of "a") \$ _____ and 32%. This represents 23% of the total contract amount (excluding award fee).

e. Total estimated dollar* and percent of planned subcontracting with HUBZone SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0 % of the total contract amount.

f. Total estimated dollar* and percent of planned subcontracting with VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0 % of the total contract amount.

g. Total estimated dollar* and percent of planned subcontracting with SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0 % of the total contract amount.

h. Total estimated dollar* and percent of planned subcontracting with "OTHER THAN SMALL BUSINESSES:" (% of "a") \$ _____ and 68%. This represents 49% of the total contract amount (excluding award fee).

*The Business Proposal contains a small business subcontracting plan with dollar values.

2. Goals – Option Year 2

State separate dollar and percentage goals for Small Business (SB), Small Disadvantaged Business (SDB), Woman-owned Small Business (WOSB), Historically Underutilized Business Zone (HUBZone) Small Business, Veteran-owned Small Business (VOSB), Service Disabled Veteran-owned Small Business (SDVOSB) and “Other than small business” (OTHER) as subcontractors, for the base year and each option year, as specified in FAR 19.704 (break out and append option year goals, if applicable) or project annual subcontracting base and goals under commercial plans.

a. Total estimated dollar value* of ALL planned subcontracting i.e., with ALL types of concerns under this contract is \$ _____ (b + h = a)

b. Total estimated dollar value* and percent of planned subcontracting with SMALL BUSINESSES (including SDB, WOSB and HUBZone, SDVOSB and VOSB): (% of "a")
\$ _____ and 31%. This represents 22% of the total contract amount (excluding award fee).

c. Total estimated dollar value* and percent of planned subcontracting with SMALL DISADVANTAGED BUSINESSES: (% of "a")
\$ _____ and 0%. This represents 0% of the total contract amount.

d. Total estimated dollar value* and percent of planned subcontracting with WOMAN-OWNED SMALL BUSINESSES: (% of "a") \$ _____ and 31%. This represents 22% of the total contract amount (excluding award fee).

e. Total estimated dollar* and percent of planned subcontracting with HUBZone SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

f. Total estimated dollar* and percent of planned subcontracting with VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

g. Total estimated dollar* and percent of planned subcontracting with SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

h. Total estimated dollar* and percent of planned subcontracting with “OTHER THAN SMALL BUSINESSES:” (% of "a") \$ _____ and 69%. This represents 50% of the total contract amount (excluding award fee).

*The Business Proposal contains a small business subcontracting plan with dollar values.

2. Goals – Option Year 3

State separate dollar and percentage goals for Small Business (SB), Small Disadvantaged Business (SDB), Woman-owned Small Business (WOSB), Historically Underutilized Business Zone (HUBZone) Small Business, Veteran-owned Small Business (VOSB), Service Disabled Veteran-owned Small Business (SDVOSB) and “Other than small business” (OTHER) as subcontractors, for the base year and each option year, as specified in FAR 19.704 (break out and append option year goals, if applicable) or project annual subcontracting base and goals under commercial plans.

a. Total estimated dollar value* of ALL planned subcontracting i.e., with ALL types of concerns under this contract is \$ (b + h = a)

b. Total estimated dollar value* and percent of planned subcontracting with SMALL BUSINESSES (including SDB, WOSB and HUBZone, SDVOSB and VOSB): (% of "a")
\$ and 26%. This represents 18% of the total contract amount (excluding award fee).

c. Total estimated dollar value* and percent of planned subcontracting with SMALL DISADVANTAGED BUSINESSES: (% of "a")
\$ _____ and 0%. This represents 0% of the total contract amount.

d. Total estimated dollar value* and percent of planned subcontracting with WOMAN-OWNED SMALL BUSINESSES: (% of "a") \$ and 26%. This represents 18% of the total contract amount (excluding award fee).

e. Total estimated dollar* and percent of planned subcontracting with HUBZone SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

f. Total estimated dollar* and percent of planned subcontracting with VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

g. Total estimated dollar* and percent of planned subcontracting with SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

h. Total estimated dollar* and percent of planned subcontracting with “OTHER THAN SMALL BUSINESSES:” (% of "a") \$ and 74%. This represents 52% of the total contract amount (excluding award fee).

*The Business Proposal contains a small business subcontracting plan with dollar values.

2. Goals – Option Year 4

State separate dollar and percentage goals for Small Business (SB), Small Disadvantaged Business (SDB), Woman-owned Small Business (WOSB), Historically Underutilized Business Zone (HUBZone) Small Business, Veteran-owned Small Business (VOSB), Service Disabled Veteran-owned Small Business (SDVOSB) and “Other than small business” (OTHER) as subcontractors, for the base year and each option year, as specified in FAR 19.704 (break out and append option year goals, if applicable) or project annual subcontracting base and goals under commercial plans.

a. Total estimated dollar value* of ALL planned subcontracting i.e., with ALL types of concerns under this contract is \$ _____ (b + h = a)

b. Total estimated dollar value* and percent of planned subcontracting with SMALL BUSINESSES (including SDB, WOSB and HUBZone, SDVOSB and VOSB): (% of "a")
\$ _____ and 24%. This represents 16% of the total contract amount (excluding award fee).

c. Total estimated dollar value* and percent of planned subcontracting with SMALL DISADVANTAGED BUSINESSES: (% of "a")
\$ _____ and 0%. This represents 0% of the total contract amount.

d. Total estimated dollar value* and percent of planned subcontracting with WOMAN-OWNED SMALL BUSINESSES: (% of "a") \$ _____ and 24%. This represents 16% of the total contract amount (excluding award fee).

e. Total estimated dollar* and percent of planned subcontracting with HUBZone SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

f. Total estimated dollar* and percent of planned subcontracting with VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

g. Total estimated dollar* and percent of planned subcontracting with SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESSES: (% of "a")\$ _____ and 0%. This represents 0% of the total contract amount.

h. Total estimated dollar* and percent of planned subcontracting with “OTHER THAN SMALL BUSINESSES:” (% of "a") \$ _____ and 76%. This represents 51% of the total contract amount (excluding award fee).

*The Business Proposal contains a small business subcontracting plan with dollar values.

Notes:

1. Federal prime contract goals are:
SB equals 23%; SDB equals 6%; HUBZone equals 3%; WOSB equals 5%; and SDVOSB equals 3% and can serve as objective for subcontracting goal development.
2. SDB, WOSB, HUBZone, SDVOSB and VOSB goals are subsets of SB and should be counted and reported in multiple categories, as appropriate.
3. please attach additional sheets showing dollar amounts and percentages for each option year

i. Provide a description of ALL the products and/or services, to be subcontracted under this contract, and indicate the size and type of business supplying them (check all that apply)

Subcontracting Product/Service	Other	SB	SDB	WOSB	HUBZone	VOSB	SDVOSB
Task 1.2 Quick Response Research • Develop research reports based on needs of LEAS in the Region	✓	✓		✓			
Task 2 Rigorous Research • Serve as Co-PI on Research Projects (Manage studies, analyze data, write reports) • Serve as field researchers in Research Projects • Provide professional development to teachers and others implementing the treatments	✓	✓		✓			
Task 3 • Coordinate reporting and other interactions with the National Laboratory Network	✓						
Task 4 Dissemination • Prepare documents for distribution through the NLN • Deliver inservice training to LEAs	✓	✓		✓			
Task 5 – Reporting to DOE	✓						
Task 6 Coordinate the NLN • Design and host the NLN servers • Maintain and update the NLN content	✓						

j. Provide a description of the method used to develop the subcontracting goals for small, small disadvantaged, woman-owned and HUBZone small businesses concerns. Address efforts made to ensure that maximum practicable subcontracting opportunities have been made available for those concerns and explain the method used to identify potential sources for solicitation purposes. Explain the method and state the quantitative basis (in dollars) used to establish the percentage goals. Also, explain how the areas to be subcontracted to small, small disadvantaged, woman-owned and HUBZone small business concerns were determined and how the capabilities of these concerns were considered for subcontract opportunities. Identify any source lists or other resources used in the determination process (attach additional sheets, if necessary).

The three initial partners met to discuss viable small business partners. We were looking for a local partner with significant experience in the areas of technical assistance and/or experimental research, and one that was capable of handling 25% of the workload of this important project, as initially specified in the RFP. We didn't know of any, so we went to the Department of Education's website where small businesses can identify themselves to potential bidders, but there were no candidates that impressed us on that list. When one of the amendments specified that a sub-contractor (or even the bidder) could reside outside the region there was an obvious choice – the Metiri Group has done a lot of work with the Pennsylvania Department of Education and Penn State University in the past, and the work was precisely what this RFP called for. Metiri has been reviewing educational research for its "Technology That Works" database, and has collaborated with school districts to conduct experimental research in school settings. They are very well known among educators in Pennsylvania and the region, and were excited by the work.

We had a conference call to discuss how the four partners would participate – which would be responsible for which tasks, and what percentage of the responsibility each would have for shared tasks. The Metiri Group naturally accumulated the percentages you see in this report as we discussed who had the skills and the time to devote to each. The reason the percentages are the same from year to year is that the roles we play remain constant in all five years.

As for the methods by which we assigned dollar amounts to responsibilities, we began by distributing the dollars in the same proportion that the Department of Education had distributed the points in the evaluation criteria, using that as a starting point. We then began to budget, finding that less money was needed in Task 5 and more in tasks one and two. Once we had a good distribution of dollars among the tasks, we distributed the dollars based on the percentage of the responsibility each partner had for each task.

All subcontractors who participated in the PSU proposal and have provided budget commitments, subject to review and acceptance by Department of Education.

k. Indirect costs have have not been included in the dollar and percentage subcontracting goals above. (check one)

l. If indirect costs have been included, explain the method used to determine the proportionate share of such costs to be allocated as subcontracts to SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns.

All partners have longstanding methods of calculating indirect costs, and each used its own method. Penn State and Rutgers have rates that are periodically negotiated with the government, and Caliber Associates and The Metiri Group had established methods for identifying indirect cost rates as well, and they are prepared to document that they are using the same rates they have used with other clients in the past.

3. Program Administrator:

NAME/TITLE: Duane Bullock

ADDRESS: 103 Procurement Services, University Park, PA 16802

TELEPHONE/E-MAIL: 814-865-5417 dmb5@psu.edu

Duties: Does the individual named above have general overall responsibility for the company's subcontracting program, i.e., developing, preparing, and executing subcontracting plans and monitoring performance relative to the requirements of those subcontracting plans and perform the following duties?

yes no _____

(If NO is checked, please indicate who in the company performs those duties, or indicate why the duties are not performed in you company)

a. Develops and promotes company-wide policy initiatives that demonstrate the company's support for awarding contracts and subcontracts to SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns; and assures that these concerns are included on the source lists for solicitations for products and services they are capable of providing. yes no

b. Develops and maintains bidder source lists of SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns from all possible sources; yes no

c. Ensures periodic rotation of potential subcontractors on bidder's lists; yes no

d. Ensures that SB, SDB, WOSB, HUBZone, VOSB and SDVOSB businesses are included on the bidders' list for every subcontract solicitation for products and services that they are capable of providing; yes no

e. Ensures that Requests For Proposals (RFP) are designed to permit the maximum practicable participation of SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns; yes no

f. Reviews subcontract solicitations to remove statements, clauses, etc., which might tend to restrict to prohibit SB, SDB, WOSB, HUBZone, VOSB and SDVOSB participation; yes no

g. Accesses various sources for the identification of SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns to include the SBA's PRO-Net and SUB-Net System, (<http://www.sba.gov>), the National Minority Purchasing Council Vendor Information Service, the Office of Minority Business Data Center in the Department of Commerce, local small business and minority associations, contact with local chambers of commerce and Federal agencies' Small Business Offices; yes no

h. Establishes and maintains contract and subcontract award records; yes no

i. Participates in Business Opportunity Workshops, Minority Business Enterprise Seminars, Trade Fairs, Procurement Conferences, etc; yes no

j. Ensures that SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns are made aware of subcontracting opportunities and assisting concerns in preparing responsive bids to the company; yes no

k. Conducts or arranges for the conduct of training for purchasing personnel regarding the intent and impact of Section 8(d) of the Small Business Act, as amended; yes no

l. Monitors the company's subcontracting program performance and making any adjustments necessary to achieve the subcontract plan goals; [✓] yes [] no

m. Prepares, and submits timely, required subcontract reports, and [✓] yes [] no

n. Coordinates the company's activities during the conduct of compliance reviews by Federal agencies. [✓] yes [] no

4. Equitable Opportunity

Describe efforts the offeror will make to ensure that SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns will have an equitable opportunity to compete for subcontracts. These efforts include, but are not limited to, the following activities:

a. Outreach efforts to obtain sources:

- 1) Contacting minority and small business trade associations;
- 2) contacting business development organizations and local chambers of commerce;
- 3) Attending SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns procurement conferences and trade fairs;
- 4) Requesting sources from the Small Business Administrations (SBA) PRONET and SUB-Net Systems, (<http://www.sba.gov/>), and other SBA and Federal agencies. Contractors may also conduct market surveys to identify new sources, to include, accessing the NIH e-Portals in Commerce, (e-PIC), (<http://epic.od.hin.gov/>). The NIH e-Portals in Commerce is not a mandatory source and may be used at the offeror's discretion..

b. Internal efforts to guide and encourage purchasing personnel:

- 1) Conducting workshops, seminars, and training programs;
- 2) Establishing, maintaining, and utilizing SB, SDB, WOSB, HUBZone, VOSB and SDVOSB source lists, guides, and other data for soliciting subcontractors, and;
- 3) Monitoring activities to evaluate compliance with the subcontracting plan.

c. Additional efforts:

- 1) Conducting training for technical staff emphasizing the importance of Socioeconomic considerations in selecting subcontractors.

See section 9 below.

5. Flow Down Clause

The contractor agrees to include the provisions under FAR 52.219-8, "Utilization of Small, Small Disadvantaged, and Women-Owned Small Business Concerns", in all subcontracts that offer further subcontracting opportunities. All subcontractors, except small business concerns, that receive subcontracts in excess of \$500,000 (\$1,000,000 for construction) must adopt and comply with a plan similar to the plan required by FAR 52.219-9, "Small, Small Disadvantaged, and Women-Owned Small Business Subcontracting Plan." (FAR 19.704(a)(4).

6. Reporting and Cooperation

The contractor gives assurance of (1) cooperation in any studies or surveys that may be required; (2) submission of periodic reports which show compliance with the subcontracting plan; (3) Submission of Standard Form (SF) 294, "Subcontracting Report for Individual Contracts," and attendant Optional Form 312, SDB Participation Report and SF-295, "Summary Subcontract Report," in accordance with the instructions on the forms; and (4) ensuring that subcontractors agree to submit Standard Forms 294 and 295.

Reporting Period	Report Due	Due Date
Oct 1 - Mar 31	SF-294/of 312	4/30
Apr 1 - Sept 30	SF-294/of 312	10/30
Oct 1 - Sept 30	SF-295	10/30
Contract Completion	OF 312	30 days after completion

Special instructions for commercial products plan: SF295 Report is due on 10/30 each year for the previous fiscal year ended 9/30.

- a. Submit SF-294 to cognizant Contracting Officer
- b. Submit Optional form 312, (OF 312), if applicable, to cognizant Awarding Contracting Officer
- c. Submit SF 295 to cognizant Awarding Contract Officer
- d. Submit "information" copy of the SF 295 and the SF 294 upon request to the SBA Commercial Market Representative (CMR); visit the SBA at <http://www.sba.gov/gc> and click on assistance directory to locate CMR.

7. Record keeping

In accordance with FAR 19.704(a)(11), the following is a recitation of the types of records the contractor will maintain to demonstrate the procedures adopted to comply with the requirements and goals in the subcontracting plan. These records will include, but not be limited to, the following:

- a. SB, SDB, WOSB, HUBZone, VOSB and SDVOSB concerns source lists, guides and other data identifying such vendors;
- b. Organizations contacted in an attempt to locate SB, SDB, WOSB, HUBZone, VOSB and SDVOSB sources;
- c. On a contract-by-contract basis, records on all subcontract solicitations over \$100,000, which indicate for each solicitation (1) whether SB, SDB, WOSB, HUBZone, VOSB and/or SDVOSB concerns were solicited, and, if not; why not and the reasons solicited concerns did not receive subcontract awards
- d. Records to support other outreach efforts, e.g., contracts with minority and small business trade associations, attendance at small and minority business procurement conferences and trade fairs;

e. Records to support internal guidance and encouragement provided to buyers through (1) workshops, seminars, training programs, incentive awards; and (2) monitoring performance to evaluate compliance with the program & requirements, and;

f. On a contract-by-contract basis, records to support subcontract award data including the name address, and business type and size of each subcontractor. (This item is not required for company or division-wide commercial products plans.)

g. Additional records:

8. Timely Payments to Subcontractors

FAR 19.702 requires your company to establish and use procedures to ensure the timely payment of amounts due pursuant to the terms of your subcontract with small business concerns, small disadvantaged small business concerns, women-owned small business concerns, HUBZone small business concerns, veteran-owned small business concerns, and service-disabled veteran-owned small business concerns.

Your company has established and uses such procedures: [] yes [] no

9. Description of Good Faith Effort

Maximum practicable utilization of small, small disadvantaged, women-owned, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns as subcontractors in Government contracts is a matter of national interest with both social and economic benefits. When a contractor fails to make a good faith effort to comply with a subcontracting plan, these objectives are not achieved, and 15 U.S.C. 637(d) (4) (F) directs that liquidation damages shall be paid by the contractor.

In order to demonstrate your compliance with a good faith effort to achieve the small, small disadvantaged, women-owned, HUBZone, veteran-owned, and service-disabled veteran-owned small business subcontracting goals, outline the steps your company plans to take. These steps will be negotiated with the contracting officer prior to approval of the plan.

Penn State is committed to developing and sustaining relationships with diverse suppliers. We believe that a diverse group of suppliers is essential for fostering healthy competition, which in turn enables our purchasing agents to obtain the very best goods and services for the University.

As part of this commitment, we adhere to a comprehensive nondiscrimination policy—and work to develop procedures and initiatives that will help ensure that all suppliers in our procurement programs receive fair consideration. One aspect of this work is our Supplier Diversity Program.

The Supplier Diversity Program was established to ensure that small, woman-owned, minority-owned, veteran-owned, and HUBZone-certified businesses have full opportunity to compete for the University's business. The Duane Bullock, our supplier

diversity manager, acts as a liaison between diverse suppliers and all University staff who have procurement responsibilities, continually reaffirming our commitment to diversity while developing procurement programs that are beneficial for everyone involved.

To promote this effort, we have implemented an online process through which businesses can identify themselves and their products and services, enabling us to find them as needed. Unfortunately, the vast majority of the businesses that are registered in this system are construction related or sales agencies selling physical products like office supplies, athletic equipment, or technologies, and no educational consulting companies with experience in technical assistance to schools or the ability to carry our educational research in the field have registered.

We were fortunate in the case of this contract, to find a small, woman-owned business that does have experience with these services who is respected by the Penn State College of Education faculty and the Pennsylvania Department of Education, and we are happy to initiate this contract working with The Metiri Group.

We look forward to involving even more small businesses, as possible, as the contract unfolds. (b)(4)

(b)(4)

Duane Bullock, our Supplier Diversity Manager, regularly reviews our contracts and our subcontracts with an eye to promoting opportunities for additional small business participation. He also conducts training sessions for others in the Penn State system to increase awareness of small business participation goals and to introduce them to new potential small business partners. We comply with all Small Business Administration reporting requirements.

We believe the level of commitment to small businesses that we show in this plan demonstrates Penn State's compliance with the requirements of the solicitation and our commitment to assisting small businesses.

VIII. APPENDICES

APPENDIX A:
BIOS

**APPENDIX A:
BIOS FOR OTHER PERSONNEL BY ORGANIZATION**

(b)(4),(b)(6)



(b)(4),(b)(6)

(b)(4),(b)(6)

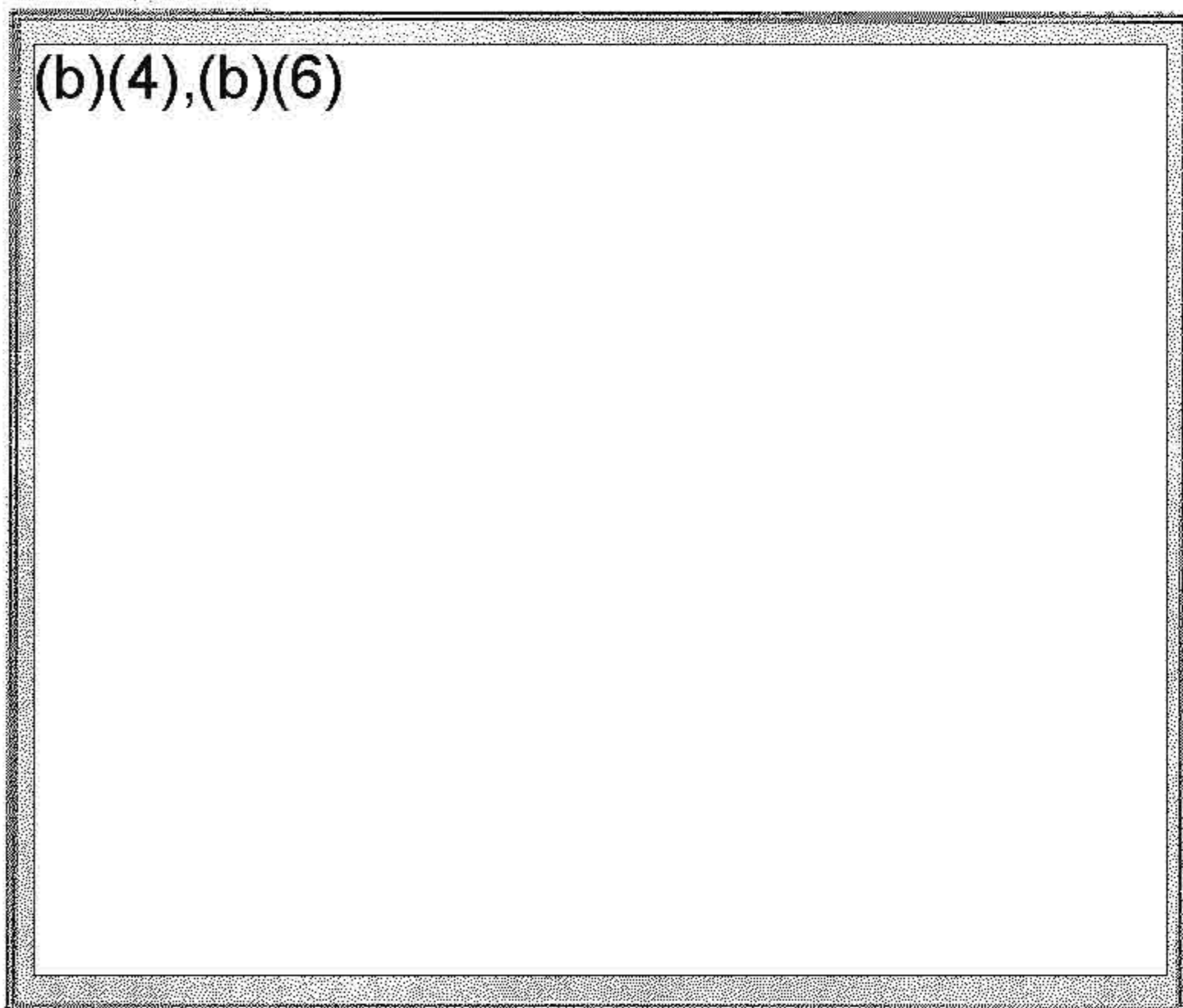
A large empty rectangular box with a thin black border, occupying most of the page. It is intended for a table of bios but is currently redacted.

(b)(4),(b)(6)

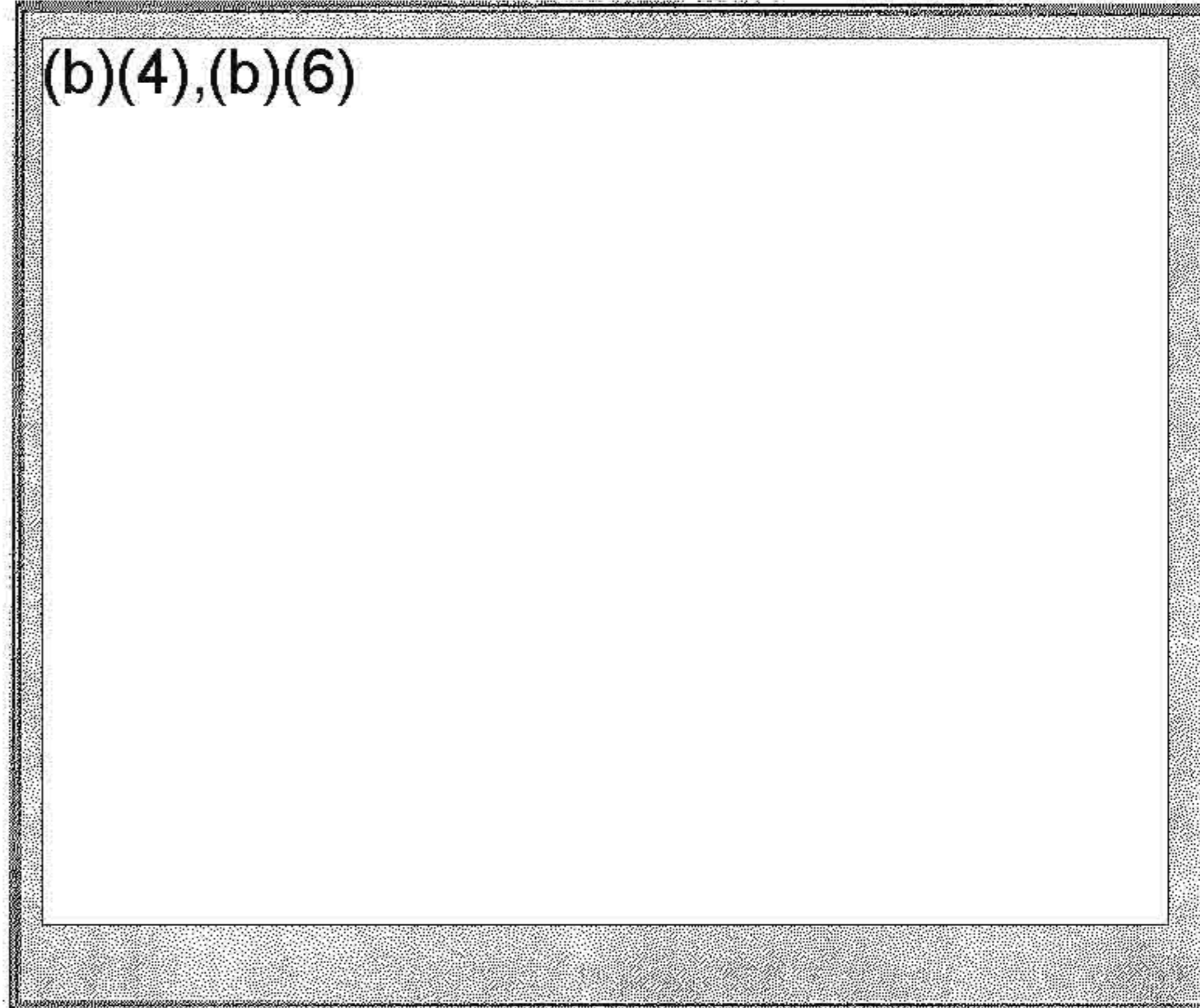
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RUTGERS, THE STATE UNIVERSITY OF NEW JERSEY

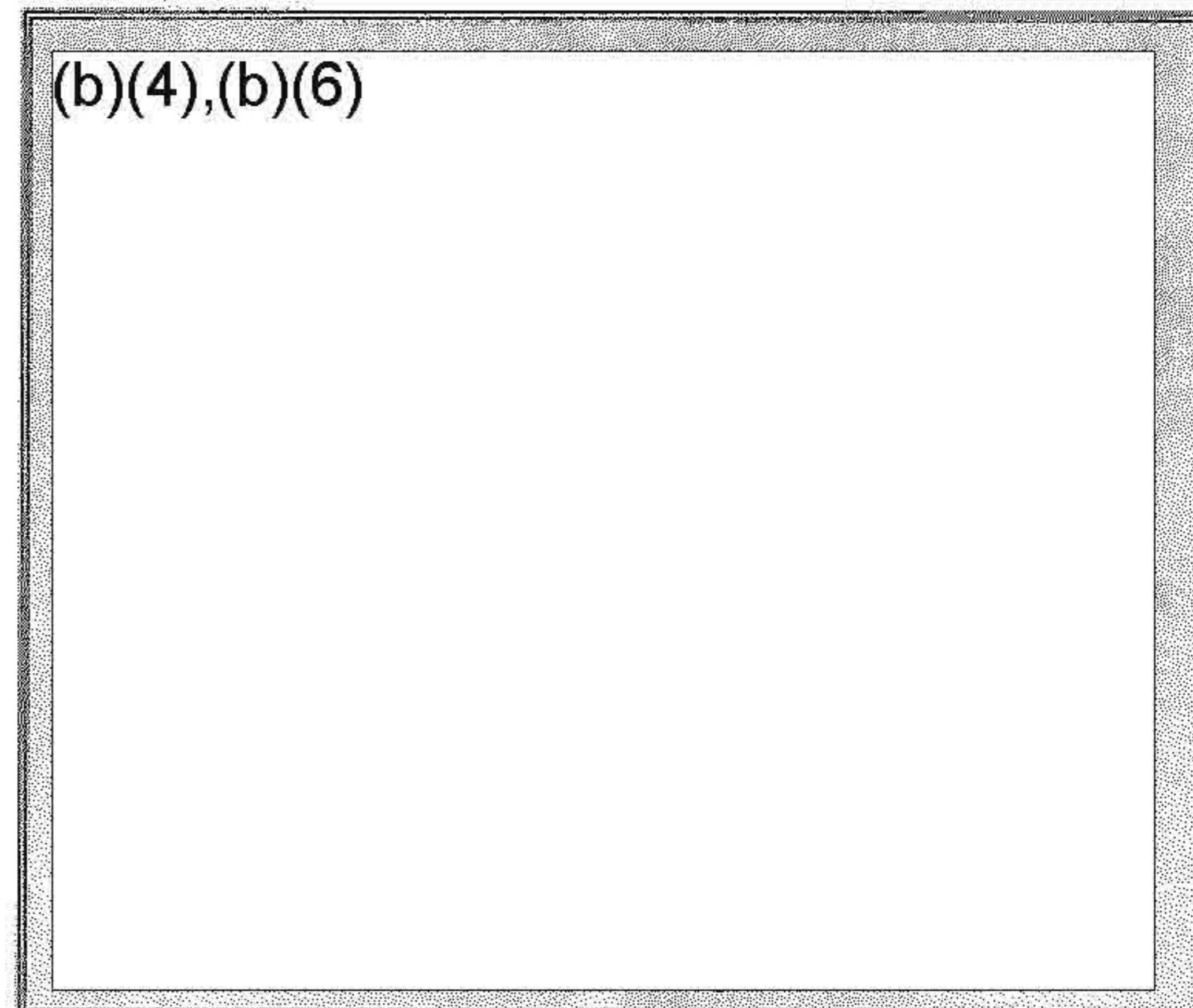
Mr. Sheldon G. Berman currently serves as Senior Mathematics Education Specialist at the Rutgers Center for Effective School Practices, providing training and technical assistance to educators in schools in need of improvement. His assistance includes strategic planning, classroom management, policy review and analysis, as well as the appropriate uses of standards, textbooks, educational technology, and approaches to the planning and delivery of mathematics instruction. Mr. Berman spent more than 30 years as a high school mathematics teacher and department head in the Philadelphia School District and K-12 mathematics supervisor in Lower Moreland, PA. He has taught undergraduate mathematics and methods courses at Weidner, Beaver (now Arcadia), and the University of Pennsylvania, is the co-author of the Philadelphia Secondary Mathematics Content Standards, a consultant on a variety of commercial mathematics products and textbooks, and served as Director of School Operations for MathForum, an online support environment for mathematics education.



Dr. Chirine Darwiche serves as a Whole School Reform Specialist at the Center for Effective School Practices at Rutgers, coaching educators in becoming reflective, collaborative learning communities. Her work has included helping schools develop effective leadership and connecting with relevant educational research. With a doctoral dissertation based on her experiences in revitalizing distressed communities by transforming public schools, her expertise is in advancing the achievement of English language learners. She has developed, implemented and revised strategic plans; assisted school communities in designing data collection, in results analysis and interpretation, as well as designing and delivering the professional development needed to improve achievement. She has also taught beginner, intermediate, and advanced ESL, assessing competency levels and improving instruction through modification of instructional materials and of placement exams.



Mr. James R. De Laney serves as a Senior School Reform Specialist for the Rutgers Center for Effective School Practices, providing training and technical assistance in leadership, small schools, AVID, and project-based learning, while serving as coach and facilitator to school management teams and principals. Previously, Mr. De Laney taught secondary school (English, social studies, and biological sciences). Mr. De Laney also served as principal of Teaneck High School, a position he held for 22 years, reflecting his commitment to maintaining educational quality and achievement during a period of increasing diversity. Upon "retirement" he



served as director of the New Jersey Charter School Resource Center and as Interim Director of a charter school.

Mr. Francis J. Livoy, a senior school reform specialist and program director at the Center for Effective School Practices, Graduate School of Education, Rutgers University, has taught English/Language Arts, Drama, Speech and Special Education at the high school level in Pennsylvania and Delaware. Mr. Livoy was selected Delaware's High School English Teacher of the Year in 1996. He has also supervised student teachers at the University of Delaware. He is a certified staff developer for Advancement Via Individual Determination (AVID) in the areas of secondary English and Advanced Placement English, is a trainer for the Buck Institute of Education's method of Project Based Learning, is a certified trainer for Critical Friends Groups, and conducts workshops for secondary staffs converting to small learning communities. He also conducts a variety of professional training workshops in reading and writing across the curriculum and has trained several school leadership teams and school boards in collaborative techniques and strategic planning. During the summer of 2005, Mr. Livoy participated in the National Writing Project mini-workshop as well as the Middle School Institute, both at Rutgers.

(b)(4)

(b)(4)

(b)(4)

CALIBER

Ms. Leah Brown, a senior administrative associate at Caliber, will provide administrative support for this effort. She has more than 30 years of experience in customer support and office management. She currently serves as a liaison to accounting, contracts, and payroll departments for Caliber staff in the Education Studies Group. Ms. Brown also provided support for the Office of Safe and Drug-Free Schools, School Security Officials meeting. She played a key role as travel coordinator by making travel arrangements for more than 30 school security officials. For the National Victim Assistance Academy project, Ms. Brown conducted telephone interviews and entered responses into an Access database.

Leah Brown
Education: A.A. Associate of Arts in Commerce, West Virginia State University
Relevant Expertise: Coordination, Meeting Management and Support
REL Role: Administrative Assistant

Ms. Elizabeth Eaton, a research assistant with Caliber, has been a member of the support staff for several projects. She currently serves on the technical support team for a Web-based reporting system sponsored by the U.S. Department of Education's Institutional Development and Undergraduate Education Services (IDUES). The system was developed to increase programmatic accountability for Title III and Title V grant programs and to meet the Department's GPRA requirements. Ms. Eaton is responsible for answering technical questions via e-mail and telephone during the annual reporting season. She is also a key member of a large-scale literature review team for the Department of Education's What Works Clearinghouse (WWC) project, which aims to build a national clearinghouse on what works in education. Ms. Eaton is assisting with the evaluation of a mathematics and science teacher professional development program supported by the Ohio Department of Education.

Elizabeth Eaton
Education: B.S. in psychology, George Mason University
Relevant Expertise: Technical Assistance, Dissemination, Research and Evaluation, and Needs Assessment
REL Role: Research Assistant

Dr. Michael Feder, an associate at Caliber,, has carried out data management and analysis for various projects. He has carried out RCT and quasi-experimental study designs, and developed databases to analyze the information from these studies. Dr Feder is currently serving as the project manager for the Evaluation of Girl Power, an empowerment program for adolescents in Pennsylvania. He is responsible for developing evaluation materials, implementing the RCT design, creating a database to manage relevant information, and providing analysis of the data collected. This involves coordinating with Girl Power program staff and subcontractors throughout the state on meeting and evaluation logistics, evaluation materials, and time management. Dr. Feder is also responsible for developing TA center products such as the Girl Power Curriculum, recruitment information, and other relevant materials. In addition, Dr Feder provides data management and analysis under contract to the Ohio State Department of Education for an evaluation of their Math and Science Program.

Michael Feder
Education: Ph.D. in Applied Developmental Psychology, George Mason University
Relevant Expertise: Large-scale database development and management, longitudinal data analysis, multivariate data analysis, Quasi-experimental and RCT design implementation.
REL Role: Research Analyst

Mr. Nicholas Gompper, an IT Manager at Caliber, leads a team of systems developers within the company's Information Technology (IT) Group. Mr. Gompper has more than a decade of experience in systems programming and research. His expertise includes Web site and Web survey design and development, relational database programming, application development, and quantitative data analysis. Mr. Gompper is also skilled in the areas of program evaluation, needs assessment, data collection (using survey research, interviews, and focus groups), and data handling. He has strong statistical knowledge and experience, including sampling design.

Nicholas Gompper
Education: M.S. in Biological Science, Ohio University
Relevant Experience: IT management, database and Web-based system development, research and data analysis
REL Role: REL Web Manager

Mr. Gompper has experience managing the design and development of Web sites and Web-based systems (including online surveys and other data collection instruments) from initial planning to full implementation. His management and leadership skills in this area are built upon strong technical knowledge; he has a full command of server- and client-side technologies as well as an understanding of the principles and best practices that support the development of robust, scalable and high-quality applications.

Mr. Gompper serves as the IT technical lead in support of the IDUES (Institutional Development and Undergraduate Education Service) Annual Performance Report System, a Web-based application for minority-serving institutions under the Higher Education Act's Title III/IV programs.

Dr. Shauna N. Harps, an associate at Caliber, has seven years experience conducting and interpreting research related to children, adolescents, and families from diverse racial/ethnic backgrounds. She has been involved with research projects at various stages, including the compilation of relevant literature, synthesizing relevant literature by writing literature reviews, locating measures, collecting data, coding and entering data, analyzing data, and writing results. Dr. Harps has also maintained database files and verified the credentials of mental health professionals. Recently, Dr. Harps served as an evaluator for the Ohio Mathematics and Science Partnership, which is a statewide initiative to improve the knowledge and skills of teachers in Ohio to facilitate effective classroom instruction in mathematics and science. She is also a member of the Children's Bureau's Systems of Care evaluation team. As an evaluation liaison, Dr. Harps is responsible for examining how effectively the systems of care approach improves the ability of child welfare agencies to work collaboratively with other agencies to provide optimal support and services for children and families.

Shauna N. Harps
Education: Ph.D. in Child and Family Studies, Syracuse University
Relevant Expertise: Research and Evaluation, Quantitative Data Analysis, Technical Writing, Literature Reviews
REL Role: Research Analyst

Mr. Thomas J. Horwood, an associate at Caliber, has nearly five years experience conducting research and evaluation projects across disciplines with a primary focus on education programs and organizations. Prior to working at Caliber, he was an evaluation program coordinator and outreach program coordinator at Kent State University in Ohio. He possesses a wide variety of expertise in research design, survey development and implementation, and quantitative and qualitative data collection, analysis, interpretation, and reporting. He has contributed to studies of programs that focus on mathematics and science teacher professional development, teacher education, teacher quality, conflict management training, out-of-school time, alternative education, employee satisfaction, diversity training, education outreach and marketing, and college graduate retention. His most recent work involves test development to measure the effectiveness of a mathematics and science teacher professional development program and growth in teacher content knowledge for the Ohio Department of Education.

Thomas J. Horwood
Education: M.Ed. in Higher Education Administration, Kent State University
Relevant Expertise: Coordination, Data Analysis, Outreach, and Research and Evaluation
REL Role: Research Analyst

Ms. Jessica Johnson, a research assistant at Caliber, has a strong background in psychology with a focus on child development issues. She has gained practical experience in education research and evaluation, early language acquisition research, the influence of culture on human development, and early childhood education. She has also acquired skills in report writing, conducting literature reviews, editing, on-site data collection and observation, data entry, grant research, participant recruitment, and database management.

Jessica Johnson
Education: B.A. in Psychology, University of California Santa Cruz
Relevant Expertise: Research and Evaluation, Training and Technical Assistance, Product Development and Dissemination
REL Role: Research Assistant

Recently Ms. Johnson has been involved in a number of projects relevant to her assigned roles for the Mid-Atlantic REL. She is currently on the Needs Assessment and Evaluation team for the Office of Victims of Crime Training and Technical Assistance Center (OVC TTAC). Through this work, she has gained experience conducting interviews; collecting, entering, and analyzing both quantitative and qualitative data; and contributing to the writing of quarterly and annual reports based on those data. She is also a key member on the literature search team for the High School Dropout Prevention topic for the Department of Education's What Works Clearinghouse. Additionally, Ms. Johnson has participated in on-site data collection efforts utilizing interview, observation, and focus groups through both the Ohio Department of Education's Math and Science Program Evaluation, and the Office of Juvenile Justice and Delinquency Prevention's Junior Achievement Program Evaluation.

(b)(4),(b)(6)

Mr. Allan Porowski, a senior associate at Caliber, has nine years of experience in statistical analysis, database management, national cross-site evaluations, and development of electronic data collection tools. He is well versed in survey development, data validation, weighting, and advanced statistical methods, including hierarchical linear modeling (HLM), structural equation modeling (SEM), and multivariate regression techniques. Mr. Porowski is also proficient in a number of database and statistical packages, including SAS, SPSS, HLM, and MS Access.

Mr. Porowski serves as Project Coordinator for the What Works Clearinghouse's Dropout Prevention review. He has been responsible for overseeing the collection of literature on dropout prevention, working in conjunction with the PI to set the parameters of the review, and judging whether articles have sufficient methodological rigor to be included in the review. Mr. Porowski also serves as the deputy director for a 3-year national evaluation of Communities in Schools, Inc. He assisted in the development of the evaluation plan, which consists of several analyses designed to triangulate the effectiveness of the program. The evaluation will culminate in a randomized controlled trial, and will include a quasi-experimental study as well.

Allan Porowski

Education: M.P.A., American University

Relevant Expertise: Large-scale database development and management, multivariate data analysis, quasi-experimental and RCT design, survey design, secondary data analysis, research implementation

REL Role: Research Analyst

Ms. Kecia Robinson, a senior associate at Caliber, has served as a coordinator for several projects. She has coordinated site visits, large-scale meetings, and publications' development. Ms. Robinson is currently serving as the director of meetings for the Emergency Response and Crisis Management Technical Assistance (ERCM TA) Center. She is responsible for managing five grantee training meetings annually. This involves coordinating with ERCM TA Center staff and subcontractors on meeting and travel logistics, training materials, staffing and budget. The purpose of the TA center is to assist local education agencies (LEAs) in improving and strengthening emergency response plans at both the district and school building level. Ms. Robinson is also responsible for developing TA center products such as brochures, exhibits, and other relevant materials.

<p style="text-align: center;">Kecia Robinson</p> <p>Education: M.S. in Administration, Central Michigan University</p> <p>Relevant Expertise: Coordination, Research and Evaluation, Training and Technical Assistance, Product Development and Dissemination</p> <p>REL Role: Lab Extension Specialist</p>
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In addition, Ms. Robinson serves as the evaluation project manager under subcontract to PASS, Inc. for the Autauga County Student Drug Testing Program to enhance, implement, and evaluate the school-based drug testing programs for students. Ms. Robinson developed interview protocols for several types of program participants as part of the process evaluation of the program to ensure validity and reliability and observation forms to assess drug testing procedures and protocols. She conducts on-site interviews with program staff, volunteers, and school principals and observes procedures during actual drug testing. Ms. Robinson uses this information along with data collected from a nationally recognized survey on self-reported drug use by students in grades 6 through 12 to provide recommendations for improving program procedures.

Ms. Wendy Townsend Sisson, a senior associate at Caliber, is a skilled social scientist with more than 10 years research, program evaluation, and training and technical assistance experience in juvenile/criminal justice, substance abuse treatment and prevention, and bilingual education. Ms. Sisson is serving as the Deputy Director for the U.S. Department of Education, Office of Safe and Drug-Free Schools Emergency Response and Crisis Management (ERCM) Program Technical Assistance (TA) Center. She is providing oversight on the development of the technical assistance infrastructure. Additionally, Ms. Sisson provides senior-level support to the Office of Juvenile Justice and Delinquency Prevention's National Training and Technical Assistance Center (NTTAC). In this role, Ms. Sisson manages the information technology, resource coordination and consultant coordination activities required to support major NTTAC initiatives. She also oversees the technical assistance process for all NTTAC initiatives.

<p style="text-align: center;">Wendy Townsend Sisson</p> <p>Education: Ph.D., ABD in Public Administration and Public Policy, Virginia Polytechnic Institute and State University, 2007</p> <p>Relevant Expertise: Research and Evaluation, Quantitative Data Analysis, Technical Writing, Technical Assistance and Training</p> <p>REL Role: Lab Extension Specialist</p>
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Previously, Ms. Sisson successfully managed to completion two initiatives in the substance abuse area: the Center for Substance Abuse Treatment's Criminal Justice Treatment Networks. On this project, Ms. Sisson led a qualitative study on collaboration and systems change across criminal justice agencies and social service organizations. Recently, she acted as a co-Principal Investigator for the National

Institute of Justice's Estimates of Drug Court Recidivism Rates project. This project was instrumental in producing the first nationwide estimates of drug court recidivism. Ms. Townsend earned an MA in applied sociology from Old Dominion and Norfolk State Universities. She is currently pursuing her doctorate at Virginia Polytechnic Institute and State University.

Ms. Madeline Sullivan, an associate at Caliber, has more than 10 years experience in education supporting university personnel preparation programs, providing direct instruction to students with special needs, researching current trends and issues, and providing technical assistance to the education community. In a variety of roles as a special educator, Ms. Sullivan honed her skills in teaching, adapting curricula, and supporting general educators who also served students with special needs. She was a contributing editor, author, and researcher in the production of "Unlocking Potential: Postsecondary Opportunities for Individuals with Learning Disabilities and AD/HD (2nd ed.)," published in 2001. Her research, writing, and technical assistance efforts have subsequently focused on facilitating the safe and healthy academic development of youth. Ms. Sullivan has been supporting educators and administrators in implementing promising practices in emergency management, violence prevention, and prosocial skill instruction, as well as collaborative and universal efforts for developing secure and constructive learning environments. Throughout her career, Ms. Sullivan has continually developed publications and communications to inform the education community of proven effective efforts supporting the positive development of youth at school, at home, and in the community.

<p style="text-align: center;">Madeline M. Sullivan</p> <p>Education: M.A. in Transition Special Education, The George Washington University</p> <p>Relevant Expertise: Training and Technical Assistance, Teaching, Writing, Resource and Product Development, Dissemination, Policy, Assessment, and Evaluation.</p> <p>REL Role: Lab Extension Specialist</p>
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Ms. Sullivan is the technical assistance coordinator for the U.S. Department of Education's Office of Safe and Drug-Free Schools' Emergency Response and Crisis Management Technical Assistance Center (ERCM TA Center). The ERCM TA Center supports local education agencies and individual schools in their collaborative efforts to strengthen their emergency response and crisis management activities. In addition to providing individualized responses, Ms. Sullivan provides a significant number of ERCM grantees technical assistance in evaluation as they develop tools to collect and analyze data, and to report their progress and findings to the U.S. Department of Education. Additionally, she researches current issues and trends, analyzes and synthesizes literature, and produces guiding materials including the "ERCMExpress." Ms. Sullivan supports additional projects at Caliber including the U.S. Department of Education's Office of Vocational and Adult Education (OVAE) program Building Capacity of Faith- and Community-based Organizations and the Ohio Mathematics and Science Partnership (OMSP) Program. For OVAE, she assists in the development of resources and products building their capacity to deliver adult literacy services. For OMSP, Ms. Sullivan serves as a key staff member in the evaluation of a statewide professional development program.

METIRI GROUP

Mr. Brian Curry, the Vice President of the Florida Education Technology Corporation and member of the Board of Directors for Florida's Education Technology Corporation, is an on-staff consultant for the Metiri Group. Some of his areas of specialization and interest are school improvement, educational technology, program evaluation, policy analysis and development, and educational research. Mr. Curry has held numerous positions as a Policy Analyst in Florida and Virginia. In addition to policy analysis, Mr. Curry has taught high school and college students. He was the Director of the No Child Left behind Technical Assistance Center at the University of Florida and the Preparing Tomorrow's Teachers to Use Technology (PT3) at the University of South Florida. Mr. Curry is a frequent presenter and has authored a number of publications.

Brian Curry

Education: Doctoral Candidate (ABD) in Educational Foundations and Policy Studies, Florida State University

Relevant Expertise: Policy analysis, educational technology, school improvement

REL Role: (b)(4)

Ms. Nicole Haning, a research assistant at The Metiri Group, has experience doing direct care work with special needs children, frequently serving as a liaison between students and public and nonpublic schools to ensure that they received individualized and appropriate instruction. Before moving to direct care, she provided program evaluation as a Research Assistant; conducting surveys, focus groups and individual interviews with program participants and assisted in the development and implementation of data collection methods. She has taught at the community college level and worked with ESL students. At Metiri she has arranged site visits for evaluators and assists the company's associates with research, data and reports.

Nicole Haning

Education: B.A. in Literature, Science and the Arts, with concentrations in Spanish and French, University of Iowa.

Relevant Expertise: Coordination, Research and Evaluation

REL Role: (b)(4)

Dr. Sara Kadjer is an Assistant Professor at the University of Louisville and an on-staff consultant for the Metiri Group. Dr. Kadjer has broad experience working directly with middle school, high school and university students in an educational capacity and has authored a number of books and articles that deal with technology and literacy. Her recent books include "Enter Here: Visual Ways to Engage Students and Readers," and "Guiding Learning with Technology." As a Graduate Fellow for the Center for Technology, she was the principal investigator on several projects that explored the use and impact of technology on classroom learning and literacy. She has also conducted multiple workshops for teachers within the Bermuda (national) school system.

Sara Kadjer

Education: Ph.D. in Philosophy, University of Virginia.

Relevant Expertise: Instructional technology, research methods

REL Role: Research Analyst

(b)(4),(b)(6)

Mr. Andrew Wainer is a research associate at the Metiri Group. Mr. Wainer brings experience in research, analysis, and writing on immigrant education and education technology. He authored the research reports "The New Latino South and the Challenge to Public Education" and "Measuring Digital Opportunity for Children," among other publications. At Metiri Group, Mr. Wainer manages and participates in qualitative and quantitative research and evaluation of education technology. He has participated on projects such as evaluating a Microsoft grant on building networked professional learning communities between universities and school districts, conducting analysis of Enhancing Education Through Technology (EETT) programs in Pennsylvania and Ohio.

Andrew Wainer

Education: M.A. in Latin American Studies, University of California, Los Angeles

Relevant Expertise: Research and evaluation, quantitative and qualitative analysis

REL Role: Research Analyst

**APPENDIX B:
LETTERS OF COMMITMENT**



Office of the Dean
Graduate School of Education • Rutgers, The State University of New Jersey
10 Seminary Place • New Brunswick • New Jersey 08901-1183 • 732/932-7496, Ext. 8118

September 27, 2005

Dr. Kyle Peck, Associate Dean
Pennsylvania State University
College of Education
277 Chambers Building
University Park, PA 16802

Dear Kyle:

Rutgers University and its Graduate School of Education enthusiastically welcome Penn State's invitation to become a partner in its bid to the U.S. Department of Education to become the Educational Lab for the Mid-Atlantic Region to address the goals of the recently reauthorized Elementary and Secondary Act.

The proposed design plays exceptionally well to our strengths as well as to those of the proposed partners. Our expertise and experience are in identifying training and technical assistance needs, in helping schools address these needs through our programs and those of others, and to monitor and assess the results to assure that the activities respond to the needs identified.

The Center for Effective School Practices (CESP) has already conducted needs surveys and has performed analyses in this Region, prompted by the Mid-Atlantic Regional Advisory Committee, a Report to the U.S. Department of Education on Educational Challenges and Technical Assistance Needs for the Mid-Atlantic Region.

In addition, surveys of the priority needs of New Jersey districts are conducted on a regular basis in preparation for developing the extensive offerings featured in the bi-annual catalogue of CESP's Academy for Teaching and Learning.

We are pleased to be part of this Penn State collaboration which has great promise for the schools and students of our State and Region.

Sincerely,

A handwritten signature in cursive script that reads "Richard De Lisi".

Richard De Lisi
Dean

Caliber Associates, Inc.
10530 Rosehaven Street
Suite 400
Fairfax, VA 22030-2840

PH: 703.385.3200
FX: 703.385.3206

www.calib.com

CALIBER

October 3, 2005

U.S. Department of Education
550 12th Street, SW, 7th Floor
Washington, DC 20202

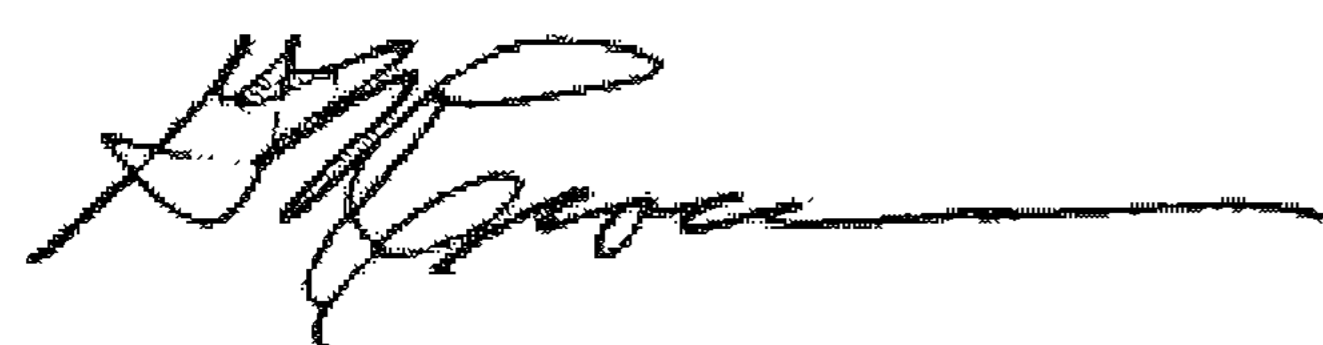
Reference: Solicitation No. ED-05-R-0006

Dear Mr. Bell:

Caliber Associates is pleased to join the Pennsylvania State University (PSU) team in submitting our response to the above referenced solicitation from the U.S. Department of Education. As a subcontractor on this project, Caliber will contribute its expertise to Tasks 1-5 for the Mid-Atlantic Regional Education Lab. Specifically, Caliber will contribute to research design and implementation, rigorous study management, training and technical assistance, information dissemination, report development, and project reporting. We consider this work to be extremely important, and should the team be selected, we will this assignment the same high visibility and priority within the firm that we accord all of our work for the U.S. Department of Education.

Caliber shares with PSU a high level of commitment to the U.S. Department of Education. Should you have any questions regarding our submission, please call Lucy Wilson or Maureen Murphy at (703) 385-3200.

Very truly yours,



Gerald M. Croan
President

Dr. Kyle Peck
Associate Dean for Outreach, Technology,
& International Programs
277 Chambers Building
Penn State University
University Park, PA 16802

Dear Dr. Peck:

It is a distinct honor to partner with Pennsylvania State University, Rutgers University, and Caliber Associates in response to the U.S. Department of Education (Solicitation #ED-05-R-0006) to lead the Mid-Atlantic Regional Educational Laboratory over the next five years.

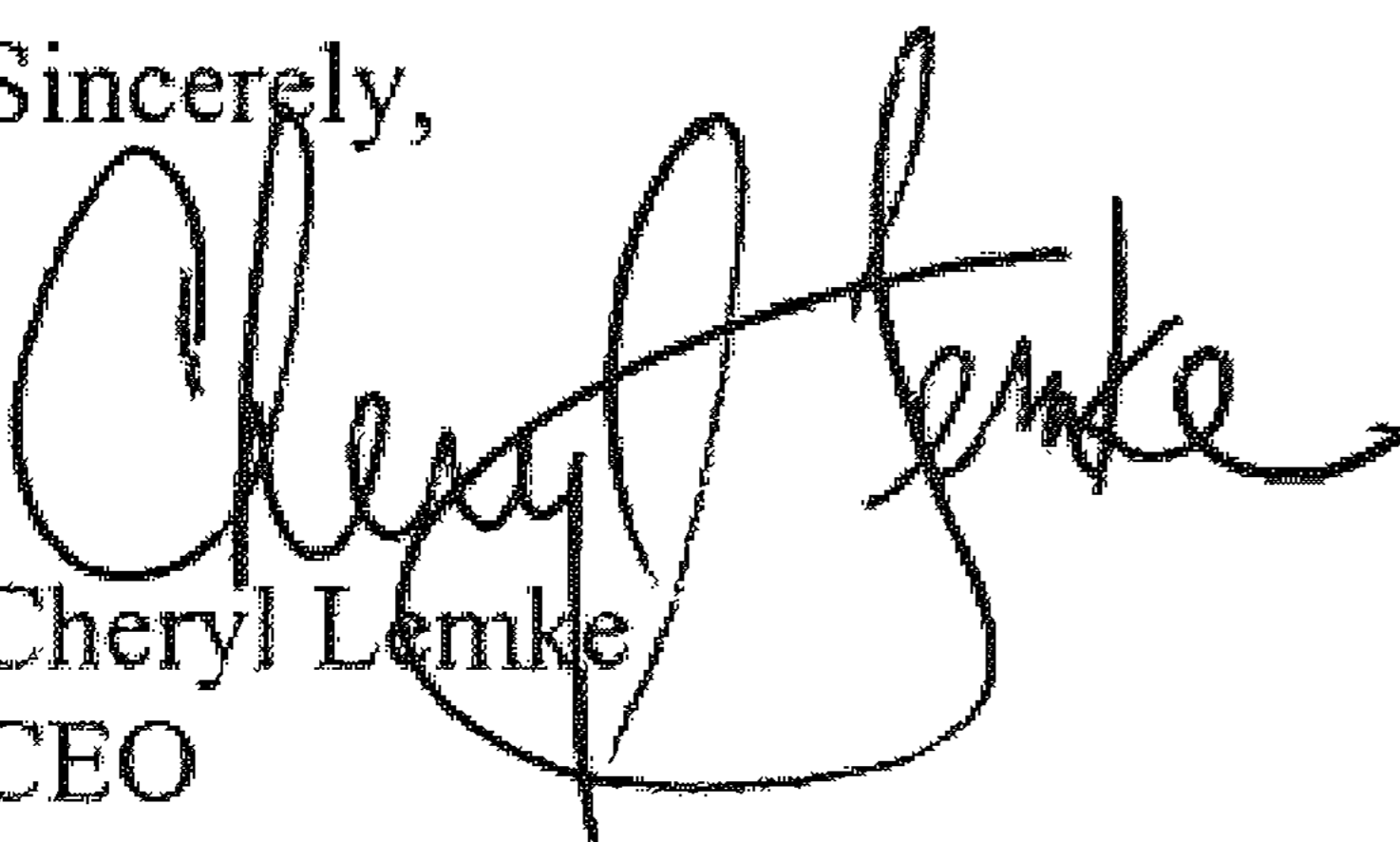
The Metiri Group has an excellent, five-year track record at the national, state, and LEA levels in education and educational technology. Both of Metiri's founding partners have over 25 years in public education in teaching and in leadership and administration at the district, regional, and state levels. As a former Associate Superintendent for the Illinois State Board of Education, I worked extensively with the North Central Regional Educational Laboratory and used NCREL's "Engaged Learning" models as cornerstones for shaping the \$30 million state technology grants I managed for the Illinois State Legislature. Given this experience, I understand firsthand the important role that an effective lab can serve for a state and its LEAs.

The Metiri partners also have extensive non-profit backgrounds, including policy and research work directing the Milken Exchange on Educational Technology for the Milken Family Foundation. That work included partnerships with the National Governor's Association, the International Society for Technology in Education, and multiple states and universities in policy, research, and information dissemination.

The Metiri Group has continued that work in the private sector since 2000. I believe that our experience with a broad range of clients – from congressional committees, to state education agencies, LEAs, non-profits, and the private sector – will serve the project well. Metiri is respected nationally for research, evaluation, data-driven decision-making, policy consultation, professional development, and leadership. A strength Metiri brings to the partnership is its unique ability to translate research findings into practical recommendations that educators at all levels find useful, practical, and focused on issues that matter to education.

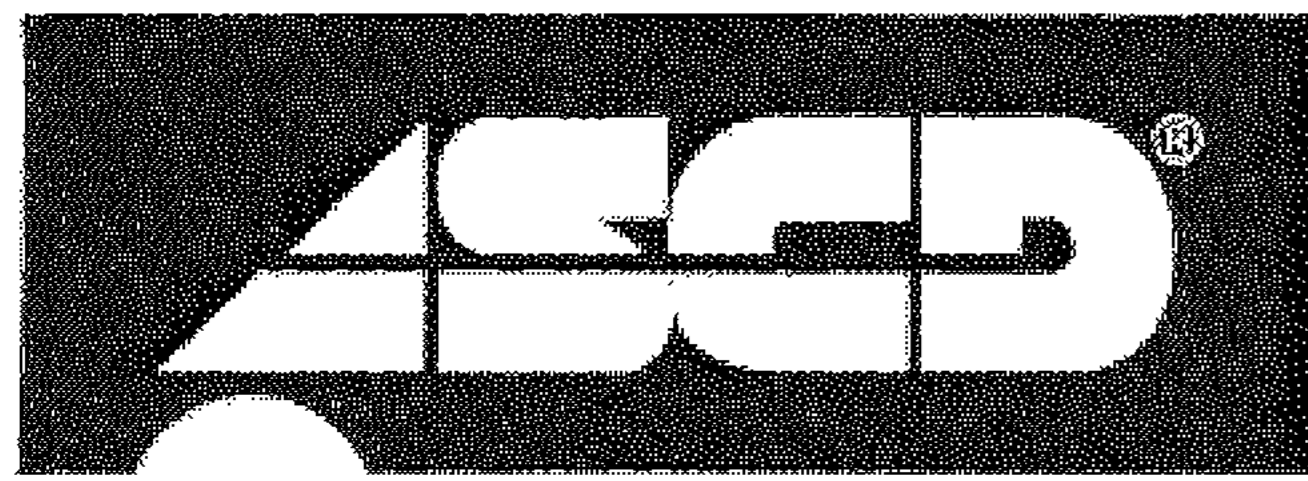
We welcome the opportunity to work with respected colleagues at Pennsylvania State University, Rutgers University, and Caliber Associates. Metiri Group is a small, woman-owned business with an excellent track record in this field. We are ready to commit the resources, expertise, and time necessary to provide high quality, timely research, analysis, technical assistance, and reports to the Mid-Atlantic region's educational institutions.

Sincerely,


Cheryl Lemke
CEO
Metiri Group, LLC

METIRI
Group

600 Corporate Pointe, Suite 1180 Culver City, CA 90230-7600 voice 310.945.5150 fax 310.945.5150 Web site www.metiri.com



September 12, 2005

Dr. Kyle Peck
Associate Dean for Outreach, Technology,
and International Programs
277 Chambers Building
Pennsylvania State University
University Park, PA 16802

Dear Dr. Peck:

The Association for Supervision and Curriculum Development (ASCD) is pleased to support the partnership of the Pennsylvania State University, Rutgers University, Caliber Associates, and the Metiri Group in a bid to the U.S. Department of Education, Office of Elementary and Secondary Education, for the regional education laboratory for the Mid-Atlantic region. ASCD also believes that this team is the ideal candidate for the national coordinating center.

ASCD is committed to sharing research based practices to achieve the success of each learner. To accomplish this, ASCD seeks out opportunities to convert research findings into accessible resources designed to improve educational policy and practice.

We are pleased to support Pennsylvania State University, Rutgers University, Caliber Associates, and the Metiri Group in this very important research to practice endeavor.

Sincerely,

A handwritten signature in black ink, appearing to read 'Gene R. Carter', is written over a large, stylized flourish that extends to the right.

Gene R. Carter
Executive Director and
Chief Executive Officer

SYNERGY ENTERPRISES INC.

October 2, 2005

Dr. Kyle Peck
Associated Dean for Outreach, Technology, and International Programs
277 Chambers Building
Pennsylvania State University
University Park, PA 16802

RE: Regional Educational Laboratories 2005-2010 Proposal

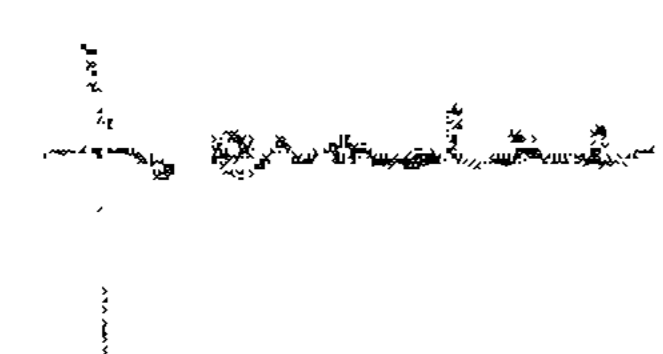
Dear Dr. Peck:

Synergy Enterprises Incorporated (SEI) is extremely enthusiastic about the opportunity to serve as a subcontractor to Caliber Associates for the above referenced solicitation. SEI's full time conference and technical assistance professionals have the necessary qualifications, experience, and expertise to efficiently provide top-notch services for the Regional Educational Laboratories 2005-2010 Proposal.

Since 2002, SEI staff have provided conference and logistics management support for meetings, workshops, conventions, and advisory committees for numerous Federal and private sector clients.

If I can be of further assistance on this matter, please contact me at 240-485-1700 x 102.

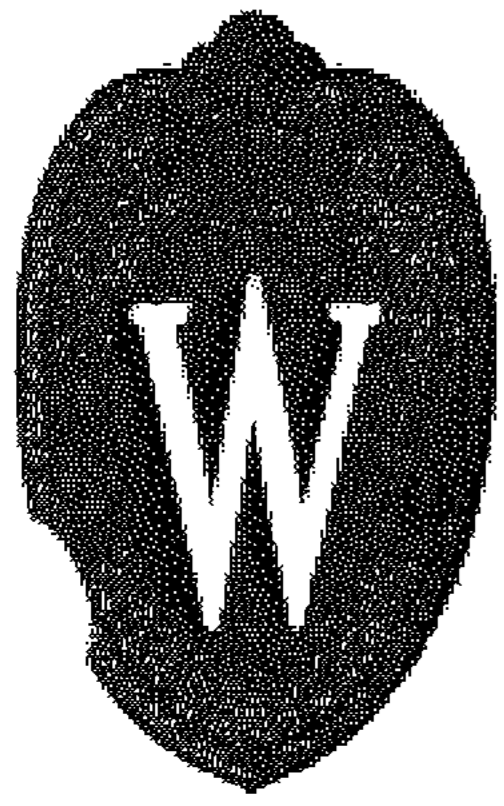
Sincerely,



Prachee J. Devadas
President/CEO

Cc: Penny Norris, SEI

CONSULTANTS



August 29, 2005

Dr. Kyle Peck
Associate Dean for Outreach, Technology,
and International Programs
277 Chambers Building
Pennsylvania State University
University Park, PA 16802

Dear Dr. Peck:

In response to your request, I am pleased to support Pennsylvania State University's bid for the Mid-Atlantic Regional Education Laboratory, in partnership with Rutgers University, Caliber Associates, and the Association for Supervision and Curriculum Development. I will serve as a member of the Technical Working Group should your partnership be awarded the contract.

Sincerely,

Geoffrey D. Borman

September 28, 2005

School of Education

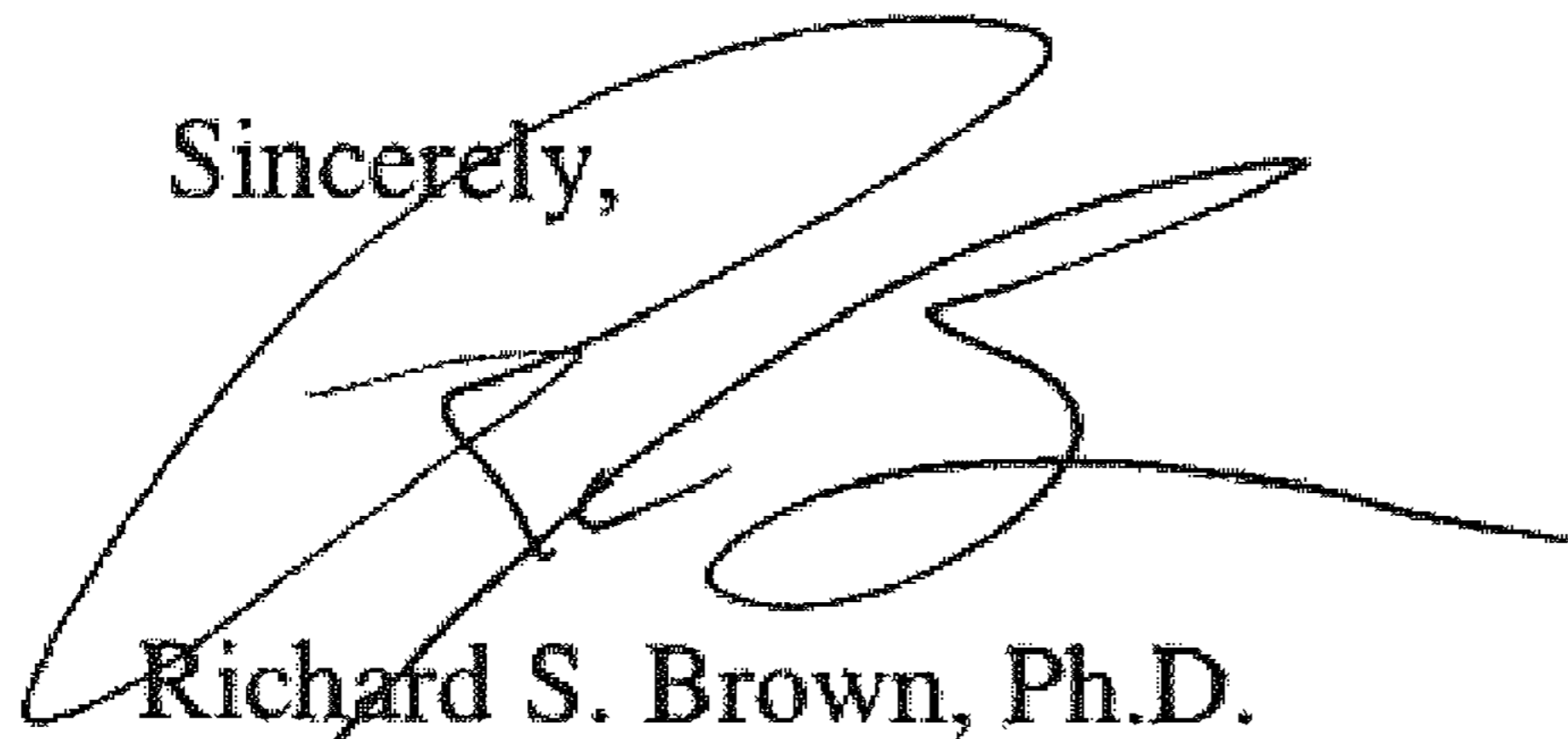
Division of Educational
Psychology and
Technology

Tracy Roberts
Caliber Associates
10530 Rosehaven Street, Suite 400
Fairfax, Virginia 22030

Dear Ms. Roberts:

In response to your request, I am willing to serve as a consultant to the Penn State/Rutgers/Metiri/Caliber Associates team on design and related technical issues on the contract to operate the Mid-Atlantic Regional Educational Laboratory for the Institute of Educational Sciences should the team win the contract award. I look forward to the opportunity to work with the team on this effort.

Sincerely,



Richard S. Brown, Ph.D.
Assistant Professor
Rossier School of Education
University of Southern California



Assessment and Evaluation Concepts Inc.

33 Jarvis Road • Old Saybrook, Connecticut 06475

A SUBSIDIARY OF TOUCHSTONE APPLIED SCIENCE ASSOCIATES, INC.

Pasquale J. DeVito, Ph.D.
President

September 7, 2005

Dr. Kyle Peck
Associate Dean for Outreach, Technology & International Programs
277 Chambers Building
Penn State University
University Park, PA 16802

Dear Kyle:

In response to your request, I am willing to serve as a consultant to the Penn State/Rutgers/Caliber Associates team on design and related technical issues on the contract to operate the Mid-Atlantic Regional Educational Laboratory for the Institute of Educational Sciences should the team win the contract award. I look forward to the opportunity to work with the team on this effort.

Sincerely,

A handwritten signature in cursive script that reads 'Pat', representing Pasquale J. DeVito.

Pasquale J. DeVito, Ph.D.
President

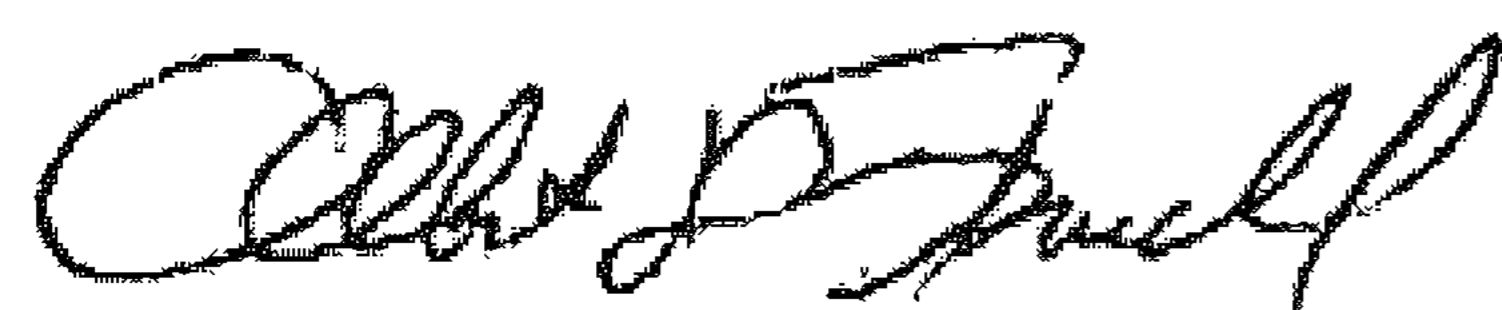
September 7, 2005

Dr. Kyle Peck
Associate Dean for Outreach, Technology & International Programs
277 Chambers Building
Penn State University
University Park, PA 16802

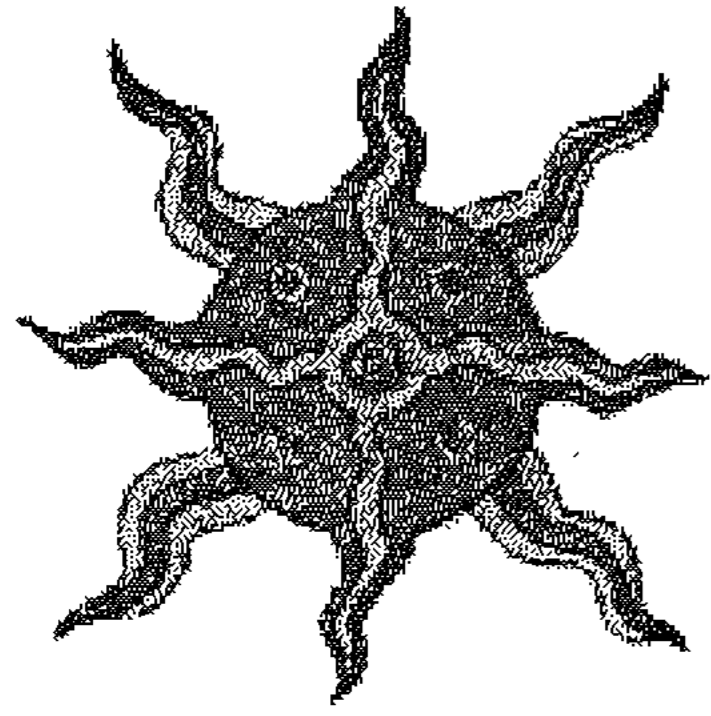
Dear Kyle:

In response to your request, I am willing to serve as a member of the Technical Working Group (TWG) to the Penn State/Rutgers/Caliber Associates team on design and related technical issues on the contract to operate the Mid-Atlantic Regional Educational Laboratory for the Institute of Educational Sciences should the team win the contract award. I look forward to the opportunity to work with the team on this effort.

Sincerely,



Albert D. Farrell, Ph.D.



National Center for Latino Child & Family Research

22610 Woodfield Road; Laytonsville, MD 20882

Maureen Murphy
Principal – Education Studies
Caliber Associates, Inc.
10530 Rosehaven Street
Suite 400
Fairfax, VA 22030-2840

September 23rd, 2005

Subject: Technical Work Group for Mid-Atlantic Regional Education Lab.

Dear Maureen,

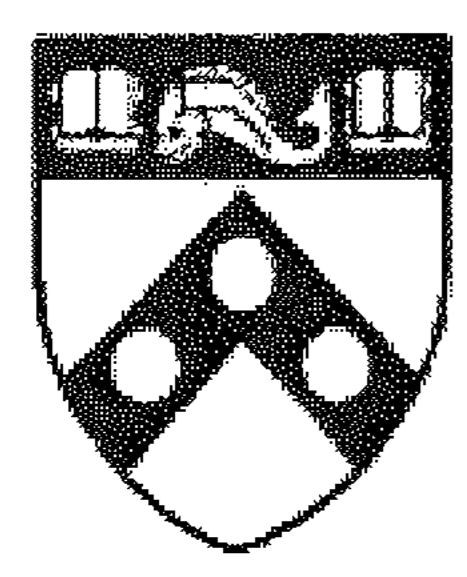
In response to your request, I would be pleased to serve as a member of the Technical Work Group for the Mid-Atlantic Regional Education Lab proposal for the Institute of Education Sciences and am acknowledging my commitment to Caliber Associates, Inc., in support of the above solicitation. Upon contract award, I would honor my commitment to perform under the above task order and agree to negotiate a resultant subcontract or related consulting agreement.

My 14 years of child research experience, mainly focused on rigorous Head Start research studies, will undoubtedly help with the various aspects of the proposed project. In addition, in my new role as Executive Director of the National Center for Latino Child & Family Research, most of my current efforts are focused on supporting new, high quality, applied research and programmatic activities on topics of relevance to Latino children and families, including: language and literacy development, early childhood education, bilingual education, higher education, childhood prevention and intervention programs, and children's mental health, with an emphasis on at-risk, low-income and/or culturally and linguistically diverse populations. Given the rapidly growing presence of Latino children and families across all levels of the public school system, this additional expertise should provide an additional area of support for the project.

I welcome the opportunity to assist the Caliber Associates and other members of the proposed TWG on this important project. If you have any questions, please contact me at (301)-537-6552 or milopez@earthlink.net.

Sincerely,

Michael L. López, Ph.D.
Executive Director,
National Center for Latino Child & Family Research



Graduate School of Education
PennGSE

Rebecca A. Maynard
University Trustee Chair Professor
215-898-3558 voice
rmaynard@gse.upenn.edu

September 2, 2005

Dr. Kyle Peck
Associate Dean for Outreach, Technology & International Programs
277 Chambers Building
Penn State University
University Park, PA 16802

Dear Kyle,

In response to your request, I am willing to serve as a consultant to the Penn State/Rutgers/Caliber Associates team on design and related technical issues on the contract to operate the Mid-Atlantic Regional Educational Laboratory for the Institute of Educational Sciences should the team win the contract award. I look forward to the opportunity to work with the team on this effort.

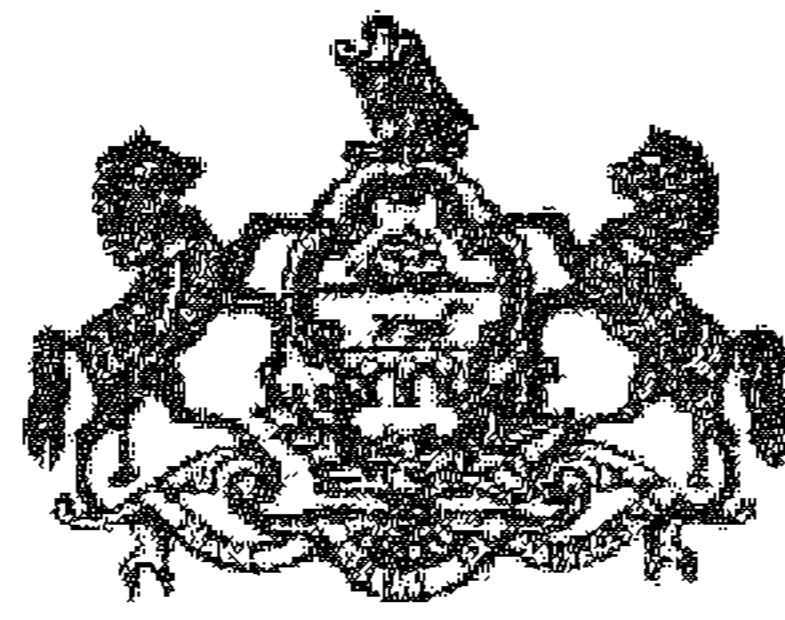
Attached is a copy of my abbreviated CV. Please let me know if you need anything else from me at this time.

Sincerely,

A handwritten signature in black ink that reads "Rebecca Maynard". The signature is written in a cursive style with a long, sweeping tail on the 'd'.

Rebecca Maynard

**APPENDIX C:
LETTERS OF SUPPORT**



COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF EDUCATION
333 MARKET STREET
HARRISBURG, PENNSYLVANIA 17126-0333

SECRETARY OF EDUCATION

September 19, 2005

717-787-5820 (TEL)
717-787-7222 (FAX)
717-783-8445 (TTY)

Dr. Kyle L. Peck
Associate Dean for Outreach, Technology
and International Programs
College of Education
The Pennsylvania State University
277 Chambers Building
University Park, PA 16802

Dear Dr. Peck:

On behalf of the Pennsylvania Department of Education, I am writing in support of the Penn State partnership application to operate the Mid-Atlantic Regional Educational Lab serving Pennsylvania, Delaware, Maryland, New Jersey, and the District of Columbia. We appreciate the interest your team has shown in understanding Pennsylvania's educational research needs and we look forward to working with you and the other powerful partners as the Regional Lab moves in toward meeting the research needs of practitioners. We need educational leaders who have a better grasp of the educational research base and who can help educators implement research-based best-practices.

We have made great progress in Pennsylvania in developing strategic plans that will result in dramatic increases in student performance, and we look forward to the Lab's assistance in helping our teachers and administrators understand the most effective educational practices. We would also like to see your personnel work with the personnel in our Intermediate Units to upgrade their skills and to help us evaluate the effectiveness of the changes we implement.

We have had many successful partnerships with Penn State University in the past, and we appreciate the design of your Lab proposal which would devote local experts in the preparation of quick response research reports, the design and delivery of professional development, and the design, conduct, and dissemination of scientifically sound educational research. These services are very important, because it is the last mile -- the execution of effective educational practices -- that will result in the level of progress we know we can achieve. Our PDE personnel have been active in the field to an unprecedented level and will continue to be, and the prospect of Regional Lab personnel working side-by-side with us in this work is very encouraging.

We look forward to the opportunity to work cooperatively and effectively with the new Mid-Atlantic Regional Educational Lab that Penn State and others are creating.

Sincerely,

A handwritten signature in cursive script, reading "Gerald L. Zahorchak".

Gerald L. Zahorchak, D.Ed.
Acting Secretary of Education



DEPARTMENT OF EDUCATION

THE TOWNSEND BUILDING
401 Federal Street Suite 2
DOVER, DELAWARE 19901
DOE WEBSITE: <http://www.doe.state.de.us>

Valerie A. Woodruff
Secretary of Education
Voice: (302) 739-4601
FAX: (302) 739-4654

September 29, 2005

Dr. Kyle Peck, Associate Dean
College of Education
Pennsylvania State University
University Park, PA 16802

Dear Dr. Peck:

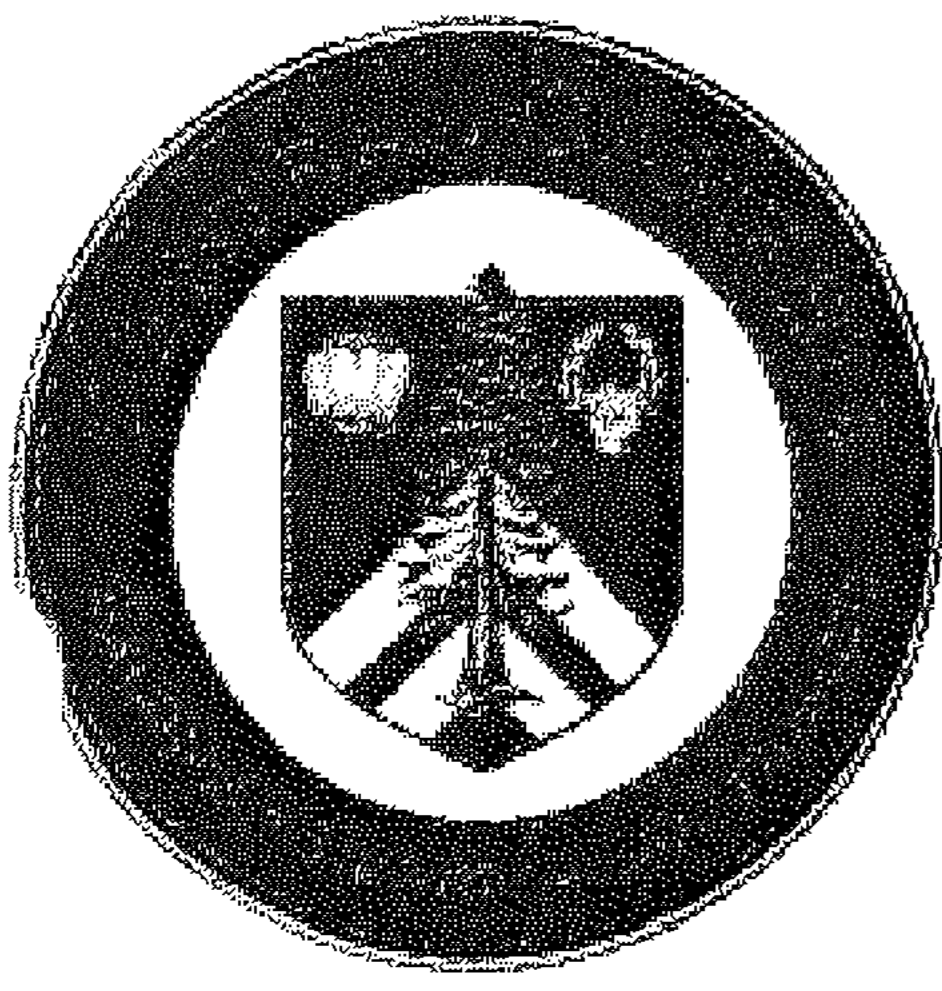
I am writing to indicate my support for Penn State's application to become the Educational Lab for our Mid-Atlantic region.

Certain aspects of your proposal resonate well, corresponding to needs we have articulated for a long time. First, it sounds as though the research that you intend and the resultant technical assistance and training will be much more reflective of our needs and of the needs of our practitioners than we are accustomed to. Second, the design features specialists who will be placed within Delaware to identify the research needs of our schools, and disseminate the results of the Lab's work to our educators. The idea of a "quick response" will also be a welcome addition.

I especially like the plan for collaboration with regional partnerships. We know well much of the work of Rutgers Graduate School of Education, having worked as partners in our Statewide Systemic Initiatives to improve mathematics and science (funded by the National Science Education). In fact, two of the principal professional development specialists of the Center for Effective School Practices at Rutgers are experienced Delaware educators who continue to live in Wilmington and participate in Delaware professional meetings.

Very truly yours,

Valerie A. Woodruff
Secretary of Education



Central Cambria School District

SUSAN WHEELER MAKOSY, D.Ed.
SUPERINTENDENT

September 16, 2005

JENNIE L. IVORY
BUSINESS ADMINISTRATOR

Dr. Kyle L. Peck
Associate Dean for Outreach, Technology,
and International Programs
277 Chambers Building
College of Education
Penn State University
University Park, PA 16802

Dear Dr. Peck:

On behalf of the Central Cambria School District, I am writing in support of the Penn State partnership's application to operate the Mid-Atlantic Regional Educational Lab serving Pennsylvania, Delaware, Maryland, New Jersey, and the District of Columbia.

We like the new direction of the Regional Labs, which involves them in the production of research that is directly relevant to the needs of teachers and administrators in our region.

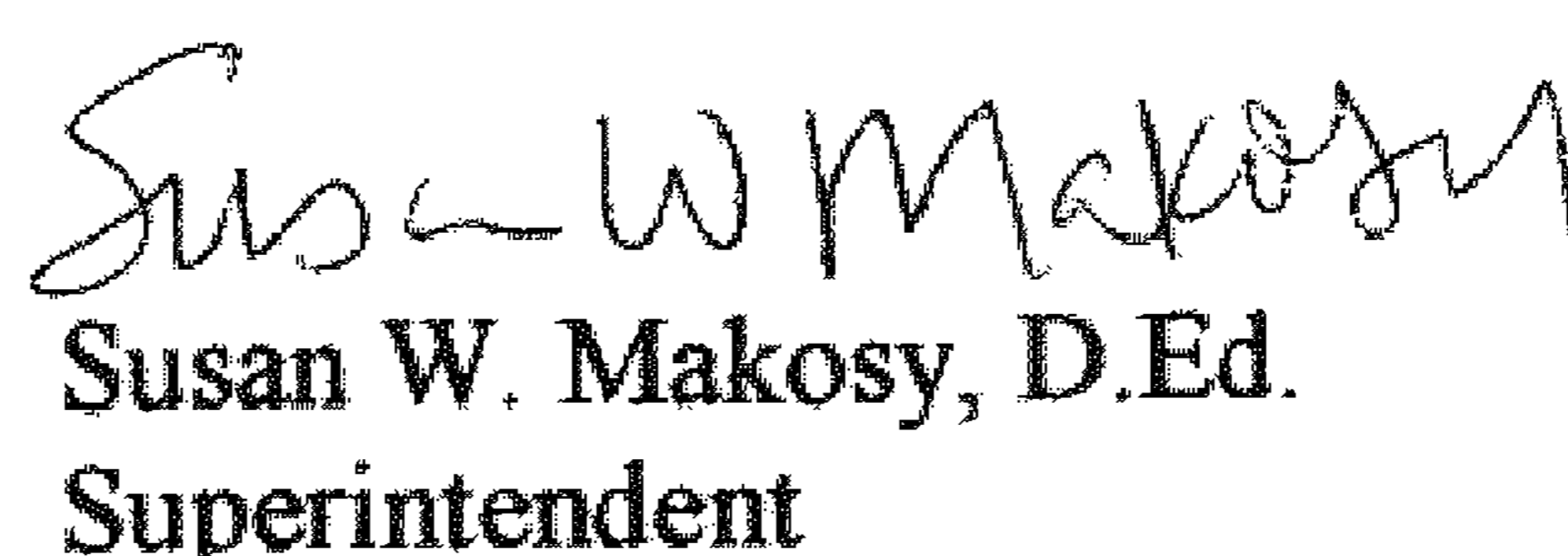
We have worked with Penn State University in the past, and we are confident that they will perform well in the preparation of quick response research reports, the design and delivery of professional development, and the design, implementation, and dissemination of scientifically sound educational research. Rutgers, too, is a very respected force in education in our region, and we are also familiar with the high-quality work of both the Metiri Group and Caliber Associates through their "Technology Solutions that Work" and "What Works Clearinghouse" online databases.

We like the proposed "Linking Agent" approach, which will bring the Lab personnel and our district personnel together several times a year. It seems like an effective way to gather information on what we need, and to keep us informed of what the Labs are learning about what works in schools.

We look forward to the opportunity to work cooperatively and effectively with the new Mid-Atlantic Regional Educational Lab that Penn State and its partners are creating.

Sincerely,

CENTRAL CAMBRIA SCHOOL DISTRICT


Susan W. Makosy, D.Ed.
Superintendent



OFFICE of the SUPERINTENDENT
1415 SIXTH AVENUE
ALTOONA, PENNSYLVANIA 16602

September 19, 2005

Dr. Kyle L. Peck
Associate Dean for Outreach, Technology, and International Programs
277 Chambers Building
College of Education
Penn State University
University Park, PA 16802

Dear Dr. Peck,

On behalf of the Altoona Area School District, I am writing in support of the Penn State partnership's application to operate the Mid-Atlantic Regional Educational Lab serving Pennsylvania, Delaware, Maryland, New Jersey, and the District of Columbia.

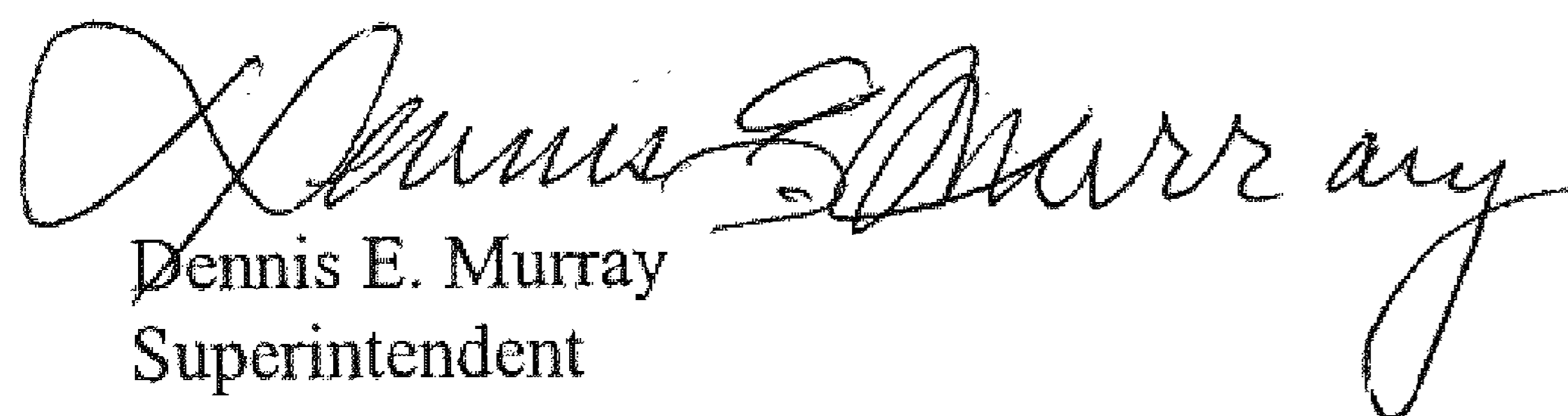
We like the new direction of the Regional Labs, which involves them in the production of research that is directly relevant to the needs of teachers and administrators in our region.

We have worked with Penn State University in the past, and we are confident that they will perform well in the preparation of quick response research reports, the design and delivery of professional development, and the design, implementation, and dissemination of scientifically sound educational research. Rutgers, too, is a very respected force in education in our region, and we are also familiar with the high-quality work of both the Metiri Group and Caliber Associates through their "Technology Solutions that Work" and "What Works Clearinghouse" online databases.

We like the proposed "Linking Agent" approach, which will bring the Lab personnel and our district personnel together several times each year. It seems like an effective way to gather information on what we need, and to keep us informed of what the Labs are learning about what works in schools.

We look forward to the opportunity to work cooperatively and effectively with the new Mid-Atlantic Regional Educational Lab that Penn State and its partners are creating.

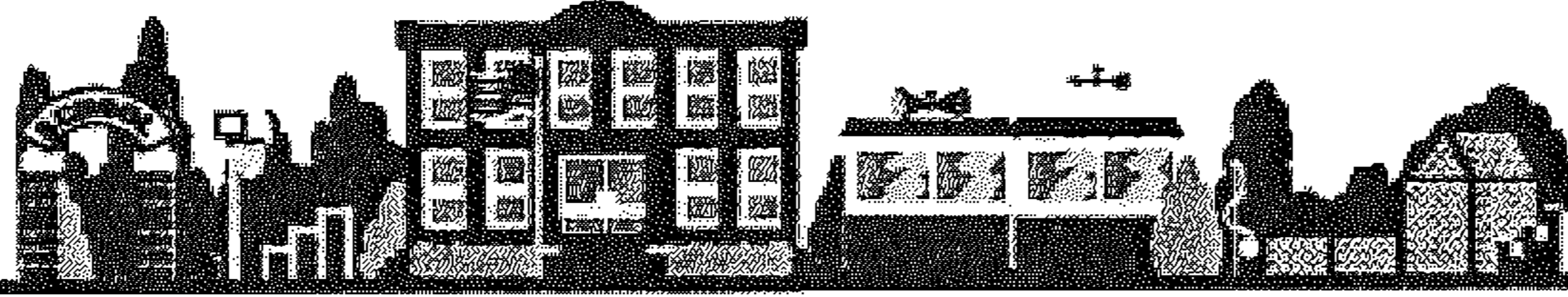
Sincerely,


Dennis E. Murray
Superintendent

DEM:sja

Lewisburg Area School District
Superintendent's Report
Mark D. DiRocco, Ph.D.

1951 Washington Ave. Dept. CO
PO Box 351
Lewisburg, PA 17837



Phone: (570) 522-3204
Fax: (570) 522-3278
Email: dirocco@dragon.k12.pa.us

Dr. Kyle L. Peck
Associate Dean for Outreach, Technology, and International Programs
277 Chambers Building
College of Education
Penn State University
University Park, PA 16802

Dear Dr. Peck,

On behalf of the Lewisburg Area School District, I am writing in support of the Penn State partnership's application to operate the Mid-Atlantic Regional Educational Lab serving Pennsylvania, Delaware, Maryland, New Jersey, and the District of Columbia.

We like the new direction of the Regional Labs, which involves them in the production of research that is directly relevant to the needs of teachers and administrators in our region.

We have worked with Penn State University in the past, and we are confident that they will perform well in the preparation of quick response research reports, the design and delivery of professional development, and the design, implementation, and dissemination of scientifically sound educational research. Rutgers, too, is a very respected force in education in our region, and we are also familiar with the high-quality work of both the Metiri Group and Caliber Associates through their "Technology Solutions that Work" and "What Works Clearinghouse" online databases.

We like the proposed "Linking Agent" approach, which will bring the Lab personnel and our district personnel together several times each year. It seems like an effective way to gather information on what we need, and to keep us informed of what the Labs are learning about what works in schools.

We look forward to the opportunity to work cooperatively and effectively with the new Mid-Atlantic Regional Educational Lab that Penn State and its partners are creating.

Sincerely,

Mark D. DiRocco

Superintendent

Joseph A. Lewis, Superintendent of Schools

Education Center
1516 Sycamore Street, Bethlehem, PA 18017-6099
610-861-0500 • Fax 610-807-5599 • e-mail: supt@bethsd.org

September 19, 2005

Dr. Kyle L. Peck
Associate Dean for Outreach, Technology, and International Programs
277 Chambers Building
College of Education
Penn State University
University Park, PA 16802

Dear Dr. Peck,

On behalf of the Bethlehem Area School District, I am writing in support of the Penn State partnership's application to operate the Mid-Atlantic Regional Educational Lab serving Pennsylvania, Delaware, Maryland, New Jersey, and the District of Columbia.

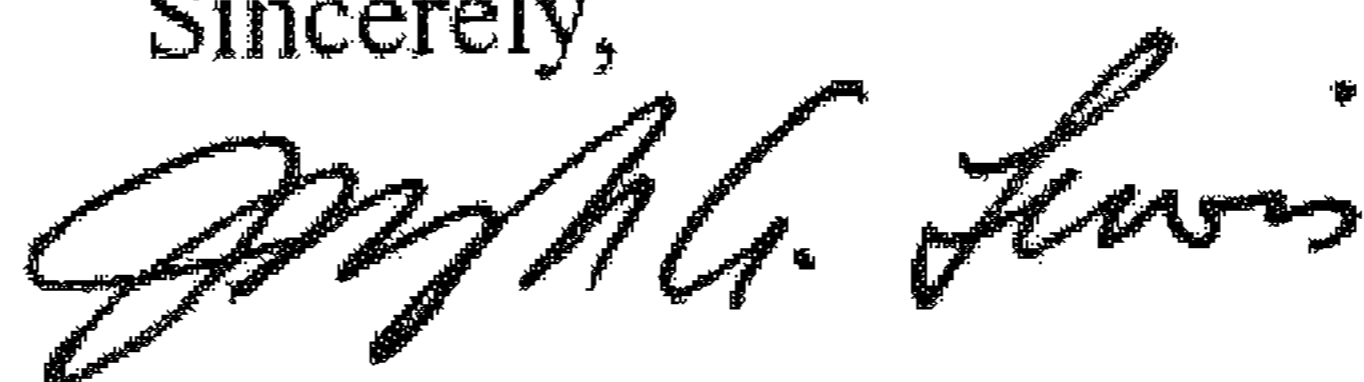
We like the new direction of the Regional Labs, which involves them in the production of research that is directly relevant to the needs of teachers and administrators in our region.

We have worked with Penn State University in the past, and we are confident that they will perform well in the preparation of quick response research reports, the design and delivery of professional development, and the design, implementation, and dissemination of scientifically sound educational research. Rutgers, too, is a very respected force in education in our region, and we are also familiar with the high-quality work of both the Metiri Group and Caliber Associates through their "Technology Solutions that Work" and "What Works Clearinghouse" online databases.

We like the proposed "Linking Agent" approach, which will bring the Lab personnel and our district personnel together several times each year. It seems like an effective way to gather information on what we need, and to keep us informed of what the Labs are learning about what works in schools.

We look forward to the opportunity to work cooperatively and effectively with the new Mid-Atlantic Regional Educational Lab that Penn State and its partners are creating.

Sincerely,



Joseph A. Lewis, Ed.D.
Superintendent of Schools

JAL:dln

Clearfield Area School District

ADMINISTRATIVE OFFICES
POST OFFICE BOX 710 438 RIVER STREET
CLEARFIELD, PENNSYLVANIA 16830
814-765-5511 FAX 765-5515

September 20, 2005

Dr. Kyle L. Peck
Associate Dean for Outreach, Technology, and International Programs
277 Chambers Building
College of Education
Penn State University
University Park, PA 16802

Dear Dr. Peck,

On behalf of the Clearfield Area School District, I am writing in support of the Penn State partnership's application to operate the Mid-Atlantic Regional Educational Lab. This Lab serves the states of Pennsylvania, Delaware, Maryland, New Jersey, and the District of Columbia. We like the new direction of the Regional Labs which makes them involved in the production of research that is directly relevant to the needs of teachers and administrators in our region.

We have worked with Penn State University in the past, and we are confident they will perform well in the preparation of quick response research reports, the design and delivery of professional development, and the design, implementation, and dissemination of scientifically sound educational research. Rutgers, too, is a very respected force in education in our region, and we are also familiar with the high-quality work of both the Metiri Group and Caliber Associates through their "Technology Solutions that Work" and "What Works Clearinghouse" online databases.

The proposed "Linking Agent" approach will bring the Lab personnel and our District personnel together several times each year. It seems like an effective way to gather information on what we need and to keep us informed of what the Labs are learning about what works in schools. We look forward to the opportunity to work cooperatively and effectively with the new Mid-Atlantic Regional Educational Lab that Penn State and its partners are creating.

Sincerely,



Denise E. Keltz, D.Ed.
Superintendent of Schools