

U.S. Department of Education

Washington, D.C. 20202-5335



APPLICATION FOR GRANTS UNDER THE

STATEWIDE LONGITUDINAL DATA SYSTEMS

CFDA # 84.372A

PR/Award # R372A070026

Grants.gov Tracking#: GRANT00234159

Receipt Status: Received Late

Closing Date: MAR 15, 2007

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Application for Federal Assistance SF-424

Version 02

* 1. Type of Submission: <input type="radio"/> Preapplication <input checked="" type="radio"/> Application <input type="radio"/> Changed/Corrected Application	* 2. Type of Application: <input checked="" type="radio"/> New <input type="radio"/> Continuation <input type="radio"/> Revision	* If Revision, select appropriate letter(s): _____ * Other (Specify) _____
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* 3. Date Received: 03/15/2007	4. Applicant Identifier: _____
-----------------------------------	-----------------------------------

5a. Federal Entity Identifier: _____	* 5b. Federal Award Identifier: _____
---	--

State Use Only:

6. Date Received by State: _____	7. State Application Identifier: _____
-------------------------------------	---

8. APPLICANT INFORMATION:

* a. Legal Name: Oregon Department of Education

* b. Employer/Taxpayer Identification Number (EIN/TIN): 93-6001954	* c. Organizational DUNS: 809790264
---	--

d. Address:

* Street1: 255 Capitol Street NE
Street2: _____
* City: Salem
County: Marion
* State: OR: Oregon
Province: _____
* Country: USA: UNITED STATES
* Zip / Postal Code: 97310-1206

e. Organizational Unit:

Department Name: OAS	Division Name: _____
-------------------------	-------------------------

f. Name and contact information of person to be contacted on matters involving this application:

Prefix: Mr. * First Name: Doug
Middle Name: _____
* Last Name: Kosty
Suffix: _____

Title: Assistant Superintendent, OAS

Organizational Affiliation:

* Telephone Number: 503-947-5825 Fax Number: 503-378-5156

* Email: doug.kosty@state.or.us

Application for Federal Assistance SF-424

Version 02

9. Type of Applicant 1: Select Applicant Type:

A: State Government

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

* Other (specify):

*** 10. Name of Federal Agency:**

U.S. Department of Education

11. Catalog of Federal Domestic Assistance Number:

84.372

CFDA Title:

Statewide Data Systems

*** 12. Funding Opportunity Number:**

ED-GRANTS-121806-001

* Title:

Statewide Longitudinal Data Systems CFDA 84.372A

13. Competition Identification Number:

84-372A2007-1

Title:

14. Areas Affected by Project (Cities, Counties, States, etc.):

schools school districts

*** 15. Descriptive Title of Applicant's Project:**

The Oregon Data Project is intended to add significant value to the foundation being built through the state's ongoing investments in data quality.

Attach supporting documents as specified in agency instructions.

Application for Federal Assistance SF-424

Version 02

16. Congressional Districts Of:

* a. Applicant

* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

17. Proposed Project:

* a. Start Date:

* b. End Date:

18. Estimated Funding (\$):

* a. Federal	<input type="text" value="5,349,490.00"/>
* b. Applicant	<input type="text" value="0.00"/>
* c. State	<input type="text" value="0.00"/>
* d. Local	<input type="text" value="0.00"/>
* e. Other	<input type="text" value="0.00"/>
* f. Program Income	<input type="text" value="0.00"/>
* g. TOTAL	<input type="text" value="5,349,490.00"/>

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

- a. This application was made available to the State under the Executive Order 12372 Process for review on .
- b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation.)**

- Yes
- No

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

**** I AGREE**

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix: * First Name:
Middle Name:
* Last Name:
Suffix:

* Title:

* Telephone Number: Fax Number:

* Email:

* Signature of Authorized Representative: * Date Signed:

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Standard Form 424 (Revised 10/2005)
Prescribed by OMB Circular A-102

Application for Federal Assistance SF-424

Version 02

*** Applicant Federal Debt Delinquency Explanation**

The following field should contain an explanation if the Applicant organization is delinquent on any Federal Debt. Maximum number of characters that can be entered is 4,000. Try and avoid extra spaces and carriage returns to maximize the availability of space.

Attachments

AdditionalCongressionalDistricts

File Name

Mime Type

AdditionalProjectTitle

File Name

Mime Type



U.S. DEPARTMENT OF EDUCATION
BUDGET INFORMATION
NON-CONSTRUCTION PROGRAMS

OMB Control Number: 1890-0004

Expiration Date: 06/30/2005

Name of Institution/Organization:
 Oregon Department of Education

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION A - BUDGET SUMMARY
U.S. DEPARTMENT OF EDUCATION FUNDS

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 1,300,000	\$ 1,330,000	\$ 1,066,900	\$ 0	\$ 0	\$ 3,696,900
2. Fringe Benefits	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
3. Travel	\$ 84,660	\$ 84,660	\$ 100,960	\$ 0	\$ 0	\$ 270,280
4. Equipment	\$ 22,500	\$ 75,000	\$ 0	\$ 0	\$ 0	\$ 97,500
5. Supplies	\$ 9,000	\$ 15,000	\$ 15,000	\$ 0	\$ 0	\$ 39,000
6. Contractual	\$ 105,000	\$ 120,000	\$ 150,000	\$ 0	\$ 0	\$ 375,000
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 50,000	\$ 50,000	\$ 50,000	\$ 0	\$ 0	\$ 150,000
9. Total Direct Costs (lines 1-8)	\$ 1,571,160	\$ 1,674,660	\$ 1,382,860	\$ 0	\$ 0	\$ 4,628,680
10. Indirect Costs*	\$ 26,238	\$ 27,966	\$ 23,093	\$ 0	\$ 0	\$ 77,297
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9-11)	\$ 1,597,398	\$ 1,702,626	\$ 1,405,953	\$ 0	\$ 0	\$ 4,705,977

***Indirect Cost Information (To Be Completed by Your Business Office):**

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government? Yes No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: ___/___/___ To: ___/___/___ (mm/dd/yyyy)

Approving Federal agency: ED Other (please specify): _____

(3) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

Is included in your approved Indirect Cost Rate Agreement? or, Complies with 34 CFR 76.564(c)(2)?



U.S. DEPARTMENT OF EDUCATION
BUDGET INFORMATION
NON-CONSTRUCTION PROGRAMS

OMB Control Number: 1890-0004

Expiration Date: 06/30/2005

Name of Institution/Organization:
 Oregon Department of Education

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION B - BUDGET SUMMARY
NON-FEDERAL FUNDS

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	(b)(4)					
2. Fringe Benefits	(b)(4)					
3. Travel	(b)(4)					
4. Equipment	(b)(4)					
5. Supplies	(b)(4)					
6. Contractual	(b)(4)					
7. Construction	(b)(4)					
8. Other	(b)(4)					
9. Total Direct Costs (lines 1-8)	(b)(4)					
10. Indirect Costs	(b)(4)					
11. Training Stipends	(b)(4)					
12. Total Costs (lines 9-11)	(b)(4)					

ASSURANCES - NON-CONSTRUCTION PROGRAMS

OMB Approval No. 4040-0007
Expiration Date 04/30/2008

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503.

PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.

NOTE: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee- 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

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Prescribed by OMB Circular A-102

9. Will comply, as applicable, with the provisions of the Davis- Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327- 333), regarding labor standards for federally-assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93- 205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).
14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.

* SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL Doug Kosty	* TITLE Assistant Superintendent O AIS
* APPLICANT ORGANIZATION Oregon Department of Education	* DATE SUBMITTED 03-15-2007

Standard Form 424B (Rev. 7-97) Back

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure.)

Approved by OMB

0348-0046

<p>1. * Type of Federal Action:</p> <p><input type="checkbox"/> a. contract</p> <p><input checked="" type="checkbox"/> b. grant</p> <p><input type="checkbox"/> c. cooperative agreement</p> <p><input type="checkbox"/> d. loan</p> <p><input type="checkbox"/> e. loan guarantee</p> <p><input type="checkbox"/> f. loan insurance</p>	<p>2. * Status of Federal Action:</p> <p><input type="checkbox"/> a. bid/offer/application</p> <p><input checked="" type="checkbox"/> b. initial award</p> <p><input type="checkbox"/> c. post-award</p>	<p>3. * Report Type:</p> <p><input checked="" type="checkbox"/> a. initial filing</p> <p><input type="checkbox"/> b. material change</p> <p>For Material Change Only:</p> <p>year quarter</p> <p>date of last report</p>
<p>4. Name and Address of Reporting Entity:</p> <p><input checked="" type="checkbox"/> Prime <input type="checkbox"/> SubAwardee Tier if known:</p> <p>* Name: Oregon Department of Education</p> <p>* Address: 255 Capitol St. NE Salem OR: Oregon 97310-1206</p> <p>Congressional District, if known:</p>	<p>5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:</p>	
<p>6. * Federal Department/Agency:</p> <p>Department of Education</p>	<p>7. * Federal Program Name/Description: Statewide Data Systems</p> <p>CFDA Number, if applicable: 84.372</p>	
<p>8. Federal Action Number, if known:</p>	<p>9. Award Amount, if known:</p>	
<p>10. a. Name and Address of Lobbying Registrant (if individual, complete name):</p> <p>* Name: none</p> <p>no lobbyist employed</p> <p>* Address:</p>	<p>b. Individual Performing Services (including address if different from No. 10a):</p> <p>* Name: none</p> <p>no lobbyist employed</p>	
<p>11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.</p>	<p>* Signature: Doug Kosty</p> <p>* Name: Mr. Doug Kosty</p> <p>Title: Assistant Superintendent OAIS</p> <p>Telephone No.: 503-947-5825</p>	

	Date: 03-15-2007
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Public Burden Disclosure Statement

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503.

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* APPLICANT'S ORGANIZATION
Oregon Department of Education
* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE
Prefix: Mr. * First Name: Doug Middle Name:
* Last Name: Kosty Suffix: * Title: Assistant Superintendent OAIS
* SIGNATURE: Doug Kosty * DATE: 03/15/2007

SUPPLEMENTAL INFORMATION REQUIRED FOR DEPARTMENT OF EDUCATION GRANTS

1. Project Director

*** Name:**

Mr.

Baron

Rodriguez

*** Address:**

255 Capitol street

Salem

OR: Oregon

97310-1206

USA: UNITED STATES

*** Phone Number:**

503-947-5683

Fax Number:

Email:

baron.rodriques@state.or.us

2. Applicant Experience:

Yes No Not applicable to this program

3. Human Subjects Research

Are any research activities involving human subjects planned at any time during the proposed project Period?

Yes No

Are ALL the research activities proposed designated to be exempt from the regulations?

Yes Provide Exemption(s) #:

No Provide Assurance #, if available:

Please attach an explanation Narrative:

FileName

MimeType

Project Narrative

Abstract Narrative

Attachment 1:

Title: Pages: Uploaded File: **9984-FINAL_Abstract.doc**

The Oregon DATA Project: Direct Access to Achievement

Abstract

Oregon school districts, like many other states, collect information about K-12 students and staff into electronic databases. Portions of these data are delivered to the state Department of Education in order to meet compliance requirements. Unfortunately, in most cases, that is the limit of the use of these data. Data are not aggregated, shared, analyzed or effectively used as a part of improving student achievement.

Fortunately, this situation is changing. School districts and regional Education Service Districts are beginning to make investments in regional data warehouses and starting to train teachers and administrators how to use data to inform instruction. The Oregon Legislature is making an \$8.4 million investment in a project that facilitates compliance reporting and the movement of standardized student transcripts horizontally across the state. The Pre-Kindergarten thru Grade 16 Integrated Data System (KIDS) is an enterprise-level data warehouse with standardized business rules for transporting, securing, managing and using data. The project is currently in its pilot phase and is scheduled for full implementation by 2011.

The Oregon DATA Project (Direct Access to Achievement) is intended to add significant value to the foundation being built through the state's ongoing investments in data quality. It will do so by strengthening the structure of the longitudinal data system that is growing already at the state level, and by providing stakeholders with comprehensive training and informed access to data.

Oregon has made noteworthy progress in its data initiatives, starting with an early investment in developing a unique secure student identifier (SSID) for every student in the school system and ending with the ongoing KIDS project. Along the way, other data-related projects such as the Integrated Data Transfer System (IDTS) have been aimed at improving data quality, access and transport.

The Oregon DATA Project will supplement and enhance these accomplishments in a way that is intensely focused on student achievement. The outcomes of the project will include a system of regional data warehouses containing highly aggregated local and state level data, coupled with professional development that will allow teachers and administrators to effectively engage in ad-hoc query and analysis of instructionally relevant student-level data from nearly anywhere in the state. The project is intended to continue beyond the limits of this grant to include ongoing data warehouse enhancements and continuing professional development for staff.

The project will be overseen by the Oregon Department of Education, and directed by the Education Enterprise Steering Committee, a highly collaborative work group comprised of representatives from ODE, the Oregon University System, Oregon community colleges, ESDs, K-12 education, and the Governor's Office.

Oregon has the basic infrastructure, the collaborative environment, and the stakeholder support necessary to build a longitudinal data system that will inform and improve student learning. Various elements of this project are already under way. Grant support will allow the state to develop a strong professional development element to improve the quality of data; to expand the scope of the project to provide more comprehensive information at the K-12 student level; and to develop a higher level of operational efficiency that will result in reduced educational costs across the state.

Project Narrative

Project Narrative

Attachment 1:

Title: Pages: Uploaded File: **5588-Mandatory_FINAL_Narrative_3-14-07.doc**

Attachment 2:

Title: Pages: Uploaded File: **1254-FINAL_Resumes.doc**

**The Oregon DATA Project:
Direct Access to Achievement**

Project Narrative

1. Need for Project

Introduction

Oregon has long been actively engaged in developing and refining process for standardizing the collection and storage of school-based data. The state's efforts began in 1997, when the Oregon Department of Education (ODE) implemented the Database Initiative (DBI), a school-level standardized data reporting system, and they continue today with the Pre-Kindergarten thru Grade 16 Integrated Data System (KIDS) project.

Along the way, Oregon became one of the first states in the nation to introduce the use of a unique secure student identifier (SSID), in the 2001-2002 school year. Shortly after that, the state created the Consolidated Collections database, which stores student-level data on test activities, demographic information, and school attendance details.

During the current school year, Oregon implemented a new unique staff identifier (USID) system. The USID allows for efficient vertical and horizontal data tracking of every school and school district employee in the state. The project spanned nearly two years, includes over 75 distinct data points per staff member, and brings Oregon into compliance with federal requirements for highly qualified teacher reporting. The USID is the gateway to staff accountability and school improvement in Oregon.

Oregon continues to improve and expand its education data infrastructure, thanks to the efforts of a highly collaborative community of educators, legislators, parents and other citizens. The Oregon Legislature has made or is poised to make significant investments in the data-related projects described below. Policy option packages on the Governor's Recommended Budget receive the highest priority, and the Ways & Means Committee has been overwhelmingly supportive of these projects.

- **KIDS** The 2005 Legislature approved the KIDS Phase II initiative to develop a pilot system for centralizing and standardizing student records and transcripts. By this spring, the pilot will complete work with four large districts and two Education Service Districts (ESDs) to create a data warehouse solution. KIDS Phase III is a project that will integrate the state's remaining 190 school districts into the statewide data warehouse, with full implementation scheduled for 2011. Remaining work includes development of an enterprise data dictionary, a new electronic student record format, and a student record exchange application available to all districts. The policy option package is included in the Governor's Recommended Budget for the 2007-2009 biennium.

- **IDTS** The 2005 Legislature funded the Integrated Data Transfer System (IDTS) project to connect the data systems of the state's three education

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sectors (K-12, community colleges, and the Oregon University System). IDTS creates a standardized, common file format (a universal transcript) to electronically transfer high school transcripts, state and national assessment data, and evidence of student proficiency from Oregon high schools to the Oregon University System and community college campuses. The linkage of IDTS feedback data will enhance the existing K-12 data access. IDTS will be operational in fall of 2007.

- **Assessment Literacy** This program provides teachers, district administrators and other stakeholders with essential information on how to use the data from student tests and assessments to improve student learning. The program will establish statewide assessment training for stakeholders and other education professionals. It also includes collaboration with Oregon universities to develop assessment literacy accreditation. Funding for the \$1.7 million initiative is included in the Governor's Recommended Budget for the 2007-2009 biennium.
- **Cross-Office Data Management** This program streamlines and enhances agency data analyses to help meet the mandates of No Child Left Behind (NCLB) and improves the quality and timeliness of data available to Oregon's public schools and citizens. The proposal will allow ODE to create more dynamic, user-friendly data tools for collection, validation, analysis, and reporting of all data. Funding for the \$494,000 initiative is included in the Governor's Recommended Budget for the 2007-2009 biennium.
- **Longitudinal Growth Model** The Growth Model allows ODE and individual schools and districts to track the learning progress and growth of individual students. Elements of the model include refined statistical formulas, a statewide communications plan, and reports that offer stakeholders relevant information. Funding for the \$1.8 million initiative is included in the Governor's Recommended Budget for the 2007-2009 biennium.

These investments are being made despite persistent funding issues for the Oregon educational system, which has a well-earned reputation for a host of "more with less" successes in student achievement and project implementation.

Education leaders, regional Education Service Districts and policymakers are moving forward with the Oregon DATA Project, which will enhance the entire system's ability to use data to inform instructional decision-making. The outcomes of the project will include a system of regional data warehouses containing highly aggregated local and state level data, coupled with professional development that will enable teachers and administrators to effectively engage in ad-hoc query and analysis of instructionally relevant student-level data from nearly anywhere in the state.

Added funding through this Institute of Education Sciences (IES) Request for Application will help Oregon more speedily realize its overarching goal of improving student learning.

Status of Current System

Student Identifiers

Oregon has a unique secure student identifier (SSID) for every student in the school system. The implementation of this system required many lengthy conversations with stakeholders across the state to determine best practices for ensuring data security.

In school year 2001-2002, the focus was on issuing SSID numbers to all students and requiring it for the first time on state assessment records for all school districts. Since then, the use of the SSID number has been expanded to all student-level data collections, and a number of the collections now have three to four years of data.

For school year 2004-2005, ODE made a conscious effort to centralize federal reporting through the EDEN portal. As of school year 2005-2006, the department received an "Outstanding Partner Award" from the U.S. Department of Education for being one of only six states to establish a formal submission plan and submit the initial set of EDEN data files from school year 2005.

For 2006-2007, ODE already has nearly 80% of its required data elements submitted to ED Facts. The EDEN data that is submitted to ED Facts is reported to ODE through various data collections. This data has gone through a variety of edit and validation checks before being loaded into the data warehouse. Once there, it is retrieved using the business rules of the data owner and file specifications from U.S. Department of Education for EDEN. The data owner validates it by using a spreadsheet to compare the data to other reports or to the raw data, ensuring that appropriate business rules have been applied. The data owner then approves this data via an internal application at ODE; it is then submitted to ED Facts.

The data compiled for submission to ED Facts is stored in a separate database and is becoming increasingly useful to data owners as a source for other federal reporting, such as the Consolidated State Performance Report (CSPR) and the Title III biennial report. The data also has been used as an acceptable source to compare data for other required federal reports to ensure accuracy and consistency, and to pull information on Limited English Proficiencies and Special Education for School Monitoring visits.

Oregon's web-based assessment system, Technology Enhanced Student Assessment (TESA), requires the SSID number as part of the login and verification process. The KIDS project will use the SSID as a basis for data gathering and electronic transfer of records between school districts.

The Integrated Data Transfer System creates a process for high schools to transmit student-level data as a standardized transcript to Oregon post-secondary institutions. This data will then be stored for each campus in electronic form to allow access to a more comprehensive set of information for each student than is currently available. The project takes advantage of the SSID to assist with record matching, but also to allow the possibility of linking student data for research purposes across the K-12, community college, and four-year public university levels. The system works with service providers and vendors to build the "send" function into the existing SIS packages already used by schools, prioritized by student volume and practicality. IDTS then creates a translation at OUS, and a router to Texas and the national EDI system used by universities across the country. The project is on track to meet its goal of incorporating records from half of Oregon's students by the end of

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June; use of funding has been so efficient that unused monies may be rolled back to the Legislature at the end of the budget cycle.

These parallel uses of the SSID allow long-term matching of student records in an unprecedented way in Oregon.

Data Architecture

Oregon's existing data environment includes a set of independent operational and transactional database systems (Student Information Systems and Business Information Systems), each with its own data model, data dictionary, business rules, and quality assurance procedures. Large and multiple school districts typically use integrated commercial systems such as SUNGARD Pentamation, eSIS, Oregon EdVantage, and PowerSchool, while tiny, rural districts use local databases and spreadsheets. Each of these systems was designed to accommodate the needs of the organizations that collect the data, and to facilitate state and federal compliance reporting.

From an operational perspective, most of these systems are generally adequate for tracking students and for state and federal reporting requirements, including those associated with NCLB. However, the systems are not integrated and the information is not standardized to any significant degree. These autonomous data systems create data quality problems and redundancies.

Data Security

ODE expects all custodians of students' information and institutional data using information technology resources to manage that data appropriately and according to the rules regarding classification of data, the Family Educational Rights and Privacy Act (FERPA) requirements, and minimum data security standards. ODE's data management policies, procedures, and practices are designed to safeguard four vital aspects of data: integrity, privacy, security, and access. In addition, ODE has adopted the Department of Administrative Services (DAS) "Acceptable Use" policy as the foundation for technology-related policies and procedures.

All public school entities within the state of Oregon are governed by FERPA. This law governs the confidentiality of student records, providing parents certain rights to their children's educational records and transferring these rights to the child when he or she turns eighteen or attends a school beyond the high school level.

The confidentiality of students' records is further supported by numerous Oregon Revised Statutes and Oregon Administrative Rules. Additionally, all school and Education Service Districts maintain policies and associated administrative rules that refer back to the Oregon Revised Statutes and Administrative Rules. These established procedures provide guidance on user access to information, and protection of individually identifiable information in the technical setting, such as access rights and privilege control.

Data Analytics and Data Driven Decision-Making

The Oregon DATA Project model presents only a portion of the total picture with respect to putting the tools for data-driven decision-making in the hands of Oregon teachers and administrators. Even in the Oregon districts that have moved ahead and purchased data warehouse solutions, there remains significant gaps in enabling teachers

and administrators to use data effectively to improve student achievement. The key to filling this gap is to provide high-quality professional development and ongoing professional and technical support on a local, regional and statewide basis.



"It is permissible to move ahead without the answer; however, if you do not have a question, do not begin."

— Mel P. Heller, Ed.D.,
Loyola University of Chicago

Data-driven decision-making touches many elements of the broad picture of student achievement and school improvement. In most cases, it begins with a basic change in the overall school and district culture with respect to using data. School personnel interested in improving the performance of their schools need first to learn how to ask the right kinds of questions that the data has the potential to help answer.

An overriding cornerstone to the successful implementation of a statewide longitudinal data system in Oregon is professional development focused on teaching school personnel how to ask the right kinds of questions. There is, and will continue to be, an intense need for data-focused professional development and the funding and support that will ensure success for the long term.

Data Warehousing

A number of Oregon school districts and ESDs have begun the process of building regional data warehouses—moving data from disparate student information systems into these warehouses, providing query and analysis tools for conducting ad-hoc and formative data analysis, and training staff on how to use data to inform and enhance instructional outcomes.

The KIDS data warehouse project is designed to integrate all 198 school districts in the state, including ESD and regional data warehouses, while developing and implementing an enterprise metadata or data dictionary. The KIDS data model and schema development is robust, and will accommodate additional data elements from the districts or regional warehouses as defined for informing instructional decision-making and professional development for teachers, district administrators, and educational research organizations. KIDS has the following key objectives:

1. Integrate students' data from all 198 school districts.
2. Standardize all data elements within the enterprise, including codes, data formats, and, and business rules.
3. Develop and implement an enterprise-level metadata repository to enable data quality process and consistency of terms and definitions across the enterprise.
4. Develop the architecture and infrastructure for a longitudinal data system for satisfying NCLB, Adequate Yearly Progress (AYP), and other federal and state compliance reporting and analysis.
5. Develop Phase 4 of the KIDS project, which will deal with areas such as finance, staff, nutrition, and transportation.

All the districts and regional warehouses will push detailed data to the KIDS warehouse to maintain common data standards, and global metadata for the enterprise of education in the state.

Summary of Limitations

There are significant limitations in the current statewide data system, primarily related to the disparate and disconnected nature of the data that is collected and stored. The KIDS project addresses some of these issues, and the Oregon DATA Project will allow the state to fill in the gaps. Following is a summary:

- Lack of adherence to statewide standards for reporting, most notable in variation in data quality from one district to the next. This causes inconsistencies in data use and usefulness from one district to the next, despite the existence of a statewide data dictionary.
- Precludes centralized training and support to improve data quality, as many perceive that they are stand-alone systems with few commonalities. There is little collaboration or resource pooling across the state as a result.
- Lack of granular, integrated, accurate, standardized data. Lack of close collaboration between the districts and ODE in tracking students as they move through the educational system, both vertically and horizontally, in order to improve performance by identifying actionable indicators.
- Need for data and tool standardization between all reporting districts to ensure accurate, consistent, and useful analytical input for decision-making purposes.
- No single version of the truth for business rules and data definitions among various data sources.
- Lack of easily validated financial information that accurately reports budgeted vs. actual expenditures by program that allows correlation of these expenditures to student performances.
- Lack of online access to information for all stakeholders regarding student progress and school quality.
- No mechanism for recording teacher data or financial data.

Gains through grant support

At the federal level:

- Access to high quality data, with reliable statewide adherence to one data dictionary and set of reporting standards.
- More accurate data for improved reporting while maintaining FERPA compliance.
- More data to inform decisions made by policymakers to cultivate school improvement and student achievement.

At the state level:

- Comprehensive communication plan to ensure stakeholders are aware of and involved in development and progress of project.
- Consistent statewide curriculum for professional development related to longitudinal data system.

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- Reduction in reporting burden.
- Elimination of duplicate requests for the same information.
- Interoperable data warehouse system, allowing for transport and transfer of critical student data and transcripts across the P-20 education enterprise.
- More data to inform decisions made by policymakers.

At the regional level:

- Improved and expanded tools for the collection, analysis, and application of high-quality data to improve instruction and student achievement.
- Comprehensive and sustained training and support in new tools, data analysis, and standards alignment (to bring conclusions from data to classrooms).
- Seamless transfer of comprehensive student transcripts within 48 hours of request.
- Ability for teachers and administrators to build and access digital dashboards to track summative and formative data at the building, classroom, and student levels.

At the school level:

- Improved and expanded tools for the timely collection, analysis, and application of high quality, meaningful data to improve instruction and student achievement.
- Comprehensive and sustained training and support in new tools, data analysis, and standards alignment to bring conclusions from data to classrooms in the form of individual learning plans per student.
- Better alignment of instruction to individual student needs.

At the community level:

- More accurate and accessible information and comparison data on schools, students.

At the research level:

- Comprehensive statewide data to perpetually assess and revise system to meet needs of administrators, teachers, and students.
- Flexibility to add and delete data elements, and to expand and contract at the state/region/district/school levels in response to student and educator changing needs.
- A sophisticated system attractive to researchers, affording the state the potential to be included in national studies.

Governance and Policy

Governance Structure

The Oregon DATA project will be directed by the Oregon Department of Education, with program management provided through the Educational Enterprise Steering Committee, a multi-stakeholder group that has been working to improve Oregon education systems for two years. The EESC's ties to all governing sectors brings statewide support for this initiative from the Governor, state Legislature, and regional and local leadership, ensuring sustainability from both a financial and an alternative resources perspective.

Communication Infrastructure

The EESC already has a communication mechanism in place, the K-12 partnership website (*k12partners.org*). This site was launched eight months ago, and has become the hub for information sharing and discussion at the ESD and district levels. Interested parties can register quickly and easily, and use a two-step process to have content updates sent directly to their e-mail so they don't have to travel to the site every day. More than 900 education professionals in Oregon are already registered and receiving weekly updates. This will remain the hub for information on the DATA Project.

Once the project is launched, the site will be expanded to provide more interactive features specific to the project, and its existence promoted during the training stage.

Analysis and Research

The Oregon DATA Project streamlines and enhances agency data analyses to help meet the mandates of and improve the quality and timeliness of data available to Oregon's public schools and citizens. The proposal will allow ODE to create more dynamic, user-friendly data tools for collection, validation, analysis and reporting of all data. In addition, the SSID used in Oregon is the key to a distributed model for the development of a longitudinal data system that allows maximum possibility for both data linkage and flexibility to adhere to future FERPA requirements.

The IDTS project includes plans for accessing K-20 data with a statewide review panel of cross-sector, high-level policymakers who would review data use requests. Approval would mean that the requesting agency or individual would be provided with a linked package of requested data that would otherwise still be in sector silos, but would be organized and connected for the approved use.

Ongoing Training

In order for a longitudinal data system to be truly effective as a tool for instructional decision-making, school staff must be fully trained and proficient in its use. Users must have a thorough understanding of the principles and concepts of data driven decision-making (DDDM) and be able to use query and analysis tools to move from reacting to results to being able to predict results. Achieving this goal means that all stakeholders must receive training that focuses on the principles and practices of DDDM.

Training and professional development activities will focus on building and maintaining school and district level data teams and supporting their work at the regional and state level through ongoing workshops, seminars and other professional development opportunities. Training resources and publications available through

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sources such as the National Center for Education Statistics also will be leveraged for the maximum benefit of stakeholders

Contributing to this effort is the Assessment Literacy initiative, which provides teachers, district administrators and other stakeholders with essential information about how to use assessment data to increase student achievement and how to evaluate outcomes and monitor program advancements. The program also partners with Oregon universities to develop assessment literacy accreditation.

Evaluation Procedures

Oregon has a well-established assessment framework in place, administered through the Northwest Regional Educational Laboratory (NWREL). The NWREL team will work closely with the DATA Project to develop a formative evaluation approach that provides timely reviews, reports, and conversations of project processes and effectiveness. NWREL also will help develop and review instruments for needs assessments, for measuring effectiveness of communications and governance strategies, and for evaluating professional development and workshop activities.

In a typical year, the organization conducts more than 30 evaluation studies in educational areas including reading, mathematics, science, history, education reform, culturally based education, and of course, technology.

Sustainability Plan

The distributed nature of the regional warehouse system not only distributes the work of collecting, storing and analyzing the data it distributes the cost. Regionalization makes it more likely that each area will allocate regional resources through local service plans and resolution dollars to sustain their data resources.

Regional distribution of the data warehouse architecture, management and professional development allows the originators of the data to interact with it in more meaningful ways. Each school district owns and is responsible for the viability of its student data. This architecture ensures the continued integrity of the custodial responsibilities over the data by the districts. In addition, regionalized data allows for the effective analysis and management of that data. The regional data warehouses will also act as clearinghouses for compliancy data before submission to the state KIDS data warehouse. Regionalized data warehouses will serve to mitigate the technical differences between individual district's student information systems, making the collection of compliancy data as well as the aggregation of school improvement data more viable.

The regional data warehouses will enforce the business rules necessary for the collection of compliancy data by the state into the KIDS data repository.

2. Project Design

Introduction

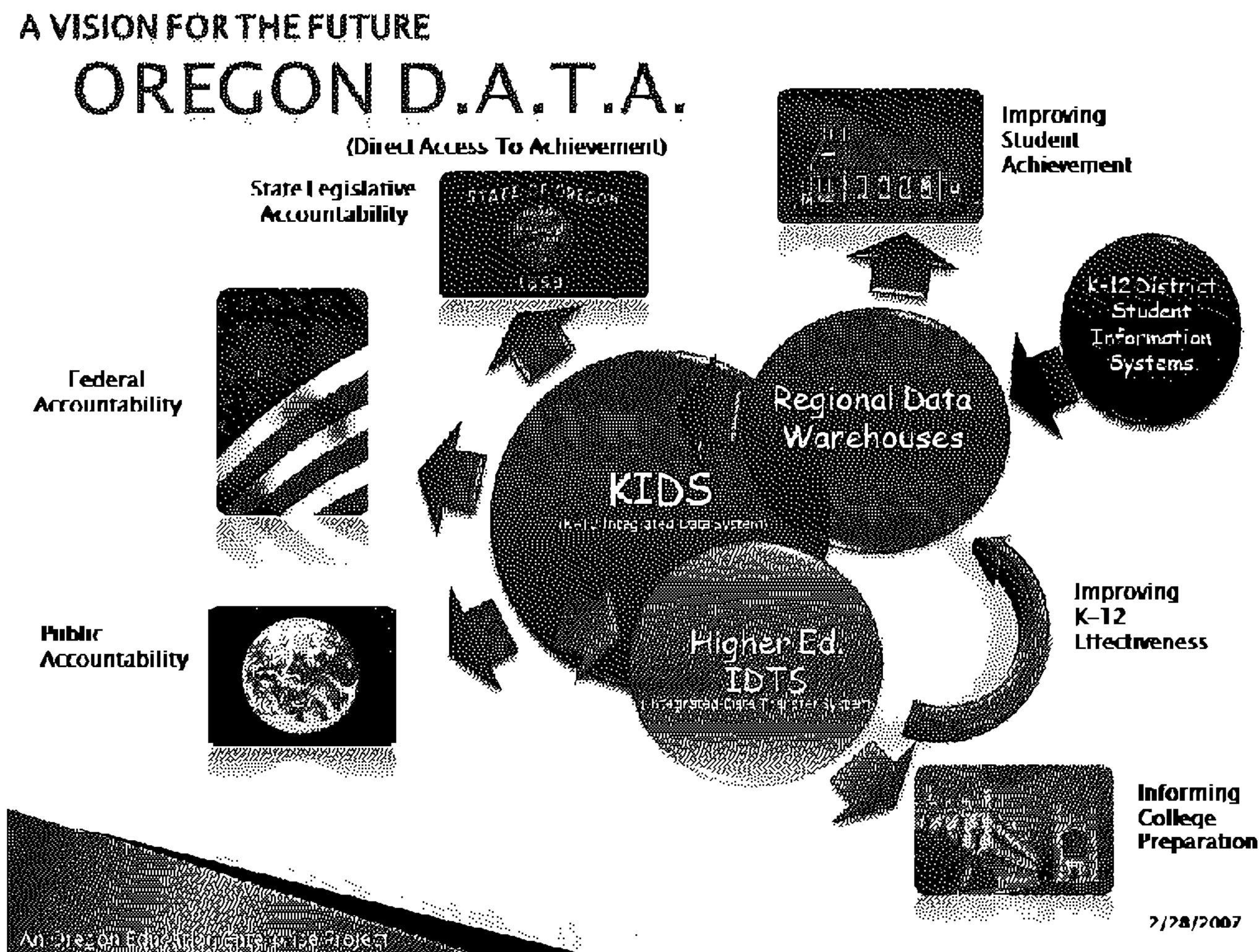
The KIDS project is currently implementing an enterprise and distributed architecture at four pilot districts, and is designed to handle compliance and transcript data from districts, regional warehouses, and other non-affiliated small districts around the state. See a diagram of the KIDS architecture on page 25.

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It is our belief that the interests of stakeholders are best served by building on the regional data warehouse system, one in which warehouses are tied together through a consistent system of standardized and interoperable data elements and accompanying data dictionary. This methodology will significantly reduce the current “disparate” environment. It will make formative data more readily available to all constituents for the purposes of informing instruction. It also will enable the level of regional autonomy necessary for customization to meet specific regional data needs. In addition, this regional approach will help deliver more tailored customer service to participating districts and reduce issues related to bandwidth and network traffic.

The proposed architecture would provide the “best of both worlds.” The standardized but customizable regional warehouses will offer a primary focus on data-driven decision-making, complemented by the KIDS state-level data warehouse, which supports easier and more reliable reporting and transcription. The end result will be a coherent statewide assessment system that allows for formative analysis with real-time data. The vertically integrated statewide longitudinal data system will provide a reliable, easily understood picture of the state of the education in Oregon.

Figure 1: The Oregon DATA Project



The project will be accomplished through a highly collaborative process that utilizes existing partnerships with schools, legislators, parents, and other stakeholders.

The Oregon DATA Project will be developed and implemented through a phased life-cycle approach and continuously evaluated through the expert services of the Northwest Regional Educational Laboratory. NWREL staff members have a great deal

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of experience working with programs and projects to clarify their logic models and evaluation questions, and to design and manage appropriate data collection plans to address those questions.

With the implementation of the data initiatives described in the “Needs” section of this proposal, Oregon has taken many of the foundational steps necessary to ensure the success of the program. Using the partnerships and data framework already in place and augmented by IES funding from the Longitudinal Data Grant, Oregon’s plan addresses these components:

- A highly structured module of policies, procedures and curriculum for professional development.
- A comprehensive survey of the data needs of key stakeholders in the Oregon school system, from the public, parent and student levels through the school, district, regional and state levels.
- A comprehensive survey of business needs.
- Creation of an enterprise-wide data architecture that draws from analysis of information needs, includes all data elements required for reporting, and specifies a data model, data dictionary, business rules, and quality assurance procedures.
- The development and deployment of data standards statewide.
- Refinement of the data warehouse system to include interoperable state and regional warehouses.
- Development of a suite of tools for data collection, analysis, generation of individual student profiles and learning plans.
- Development of a comprehensive and sustained training program for districts and schools.
- Development of a comprehensive data quality assurance program that includes continuous improvement measures.
- Development of a significant research initiative that enables the quality data gathered to be shared for measurement of progress, to assess the success of the post-secondary loop, and to tease out content areas that need improvement.

Business needs analysis

The business needs analysis is already in progress at the state and regional warehouse level, through KIDS, IDTS, and the work of the regional ESDs. Compliance reporting and transaction information will complement the longitudinal data system’s goal of monitoring and improving student performance.

Funds associated with this grant will allow Oregon to expand current efforts to include a statewide, detailed analysis of specific classroom, school and district information needs with attention paid to the analysis of data to drive instructional decision-making all the way to the classroom level.

The survey tool will be defined and developed by the Data Quality Work Group. Oregon’s regional Education Service Districts will deploy the tool, gather the information from member districts, and validate that data. The validated data

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will be aggregated by the Oregon DATA Project director, assisted by curriculum leaders from the Instructional Learning Council (ILC), a statewide school improvement consortium. The Data Quality Work Group will use that information to design the program.

Data collection inventory

Oregon currently operates under several data systems, including KIDS, IDTS, large regional warehouses, large district warehouses, and a variety of transactional school information systems.

One of the priorities of the Oregon DATA Project is to ascertain exactly which systems are in place statewide. Which transaction systems are being used where? Who is hosting these systems? What do they have access to? How do they analyze data? Where do schools not have access to a warehouse? What questions do practitioners need the answers to, in order to improve instruction?

A needs-based prioritization of resources means schools with little or no access, support or tools will be brought online first. Additionally, the survey will assess the systems that are defined and prioritize the systems that are currently being used. The intent of this assessment will be to determine what is actually being done in the field every day to drive school improvement. Who is doing what kind of data collection? How are they using the processes? The goal is to identify how the 198 school districts in Oregon are using data to drive decisions.

Questions to be asked include: How many districts are relying on state standards vs. developing their own school or district-based standards? Who is doing PBS (Positive Behavior Support) and RTI (Response to Intervention)?

Data architecture design

The data architecture of Oregon's project will consist of a distributed set of regional data warehouses already hosted or in development by Education Service Districts. These regional warehouses will be tied together by the state KIDS warehouse. The Oregon DATA Project defines a "regional data warehouse" as an ESD or group of ESDs hosting a data warehouse (for multiple districts, for example).

Part of the work of the project will consist of creating, documenting and implementing standardized data elements, data codes, business rules, extensible data model/schema, and enterprise level metadata repository for KIDS and regional warehouses. In this way, all data warehouses in the state system will remain synchronized with the master KIDS warehouse. This will also facilitate the change control process and sharing of development for economies of scale.

Preliminary information regarding information needs at classroom, school, district, state, and federal levels indicates that, in order for a statewide longitudinal data system to be useful at all levels, it must contain two primary categories of data.

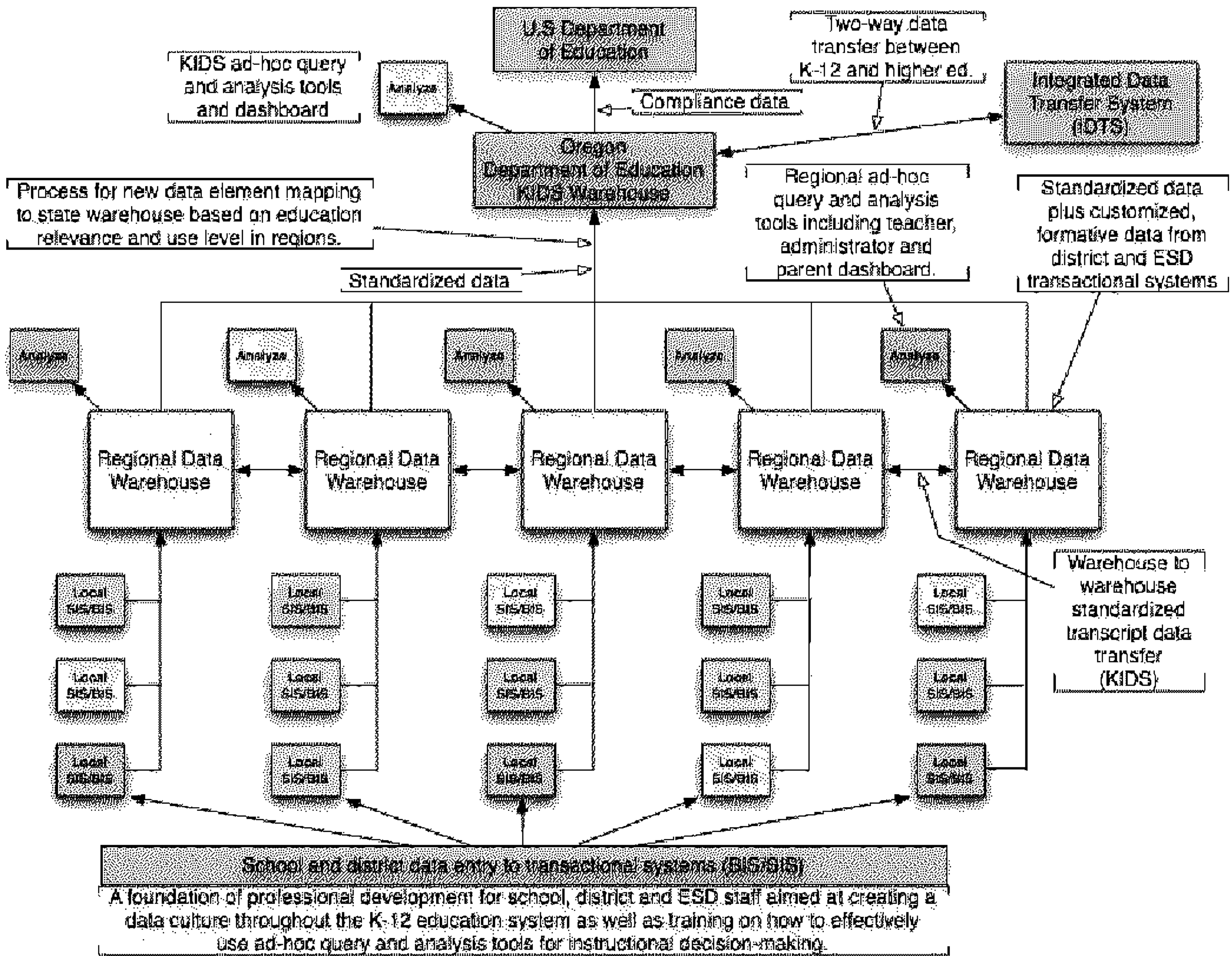
First, it must contain data elements required by the Oregon and federal departments of education for the purposes of educational compliance and reporting. The KIDS project is intended to fulfill those requirements by extracting data from district and regional data centers into a statewide data warehouse. KIDS collects information primarily for use in compliance procedures, while the work of the regional and data warehouses are intended for use in informing instruction. KIDS is a data warehouse

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project, and all relevant data at the enterprise level that requires integration will be pushed or pulled from district or regional data systems or warehouses, whether to inform instruction, compliance reporting, or policy development.

Second, it must contain data at the level of granularity that can easily be used to analyze the effectiveness of instructional programs and processes. The Oregon DATA Project would include these categories of additional data, which would be collected from all district student information systems and regional data warehouses: attendance, behavior, program status (such as English Language Learner, Title I), and formative assessment data.

Figure 2: Architecture Model



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Data in local data warehouses and in student information systems would be tied to the state KIDS data warehouse by extracting raw data elements from district and regional systems. This would provide a statewide connection of data, allowing record transfer and potentially a systemwide view of the data.

The Oregon DATA Project will provide processes for aligning the various metadata. As long as there are disparate systems, the metadata alignment will be in the form of: 1) defining required features for the data model, minimum data requirements and the data attributes to be defined within the data dictionary; and 2) defining consistent business rules that will fit across and align the various systems, aiding the goal of ensuring quality data.

In order to do that, all of the important specific data requirements throughout the state that align to the ED Facts (EDEN) data will be analyzed. In addition, an enhanced statewide data element roster will be shared at a district level.

Unique permanent student identifier use

As discussed in the “Needs” section, Oregon has a fully functional SSID system in place. All Oregon students have SSID numbers, which are required on all student-level data collections for all school districts. A number of these collections now house three to four years’ worth of student-level data. In addition, Oregon has implemented a Unique Staff ID system (USID) that captures the required elements needed for the High Quality Teacher requirements of NCLB.

Oregon’s TESA (Technology Enhanced Student Assessment) program is a web-based testing system that requires the SSID number as part of the login and verification process. The KIDS state data warehouse project will use the SSID as a basis for data gathering and electronic transfer of records between school districts. The SSID also offers the potential for the Integrated Data Transfer System, which connects the data systems of Oregon’s three education sectors, to link student data for research purposes across the K-12, community college, and six- year public university levels.

Data collection implementation

The success of the survey phase depends upon effectively leveraging the input of all stakeholders. The K-12 Partners website will be used for interactive engagement of stakeholders to gather feedback on recommendations made by the Data Quality Work Group.

This collective input will be used to build a collaborative communication system to aid in effective data collection, reporting, and dissemination. Stakeholder groups will be provided with interactive opportunities for input in all phases of the process, including web-based channels and face-to-face meetings.

Oregon currently has a web-based assessment system in place that shortens reporting time and increases data accuracy. The TESA program currently uses web-delivered tests to assess each student’s progress toward meeting or exceeding state standards and earning the state’s Certificate of Initial Mastery or Certificate of Advanced Mastery. The program delivers results quickly and helps each student know his or her strengths and areas that need more study and practice.

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Districts have reported that students who received their scores quickly showed significant improvement over students who test results took time to appear. These results reinforce our belief that making student data available quickly and accurately greatly improves student performance, as well as the educational systems ability to meet students' needs.

Data system implementation

Regional warehouses will modify their data systems to address the needs of their component districts as data is collected, verified, and aggregated. The regional warehouses will then construct analysis tools within their system so that granulated data can be successfully transmitted back to the field. The ESDs will coordinate and manage this process.

Northwest Regional Educational Laboratory team members will conduct stringent testing to ensure that data has validated functionality. A comprehensive professional development component will include regional training on the business intelligence tools for all data users.

The third stage of the implementation plan is going live, which will begin with a tightly controlled and continuously evaluated pilot plan, and, after necessary modifications have been made, expand to a full rollout, with neediest districts receiving first exposure.

Business intelligence tools use

The heart of the success of any data warehouse project lies in the ability to easily conduct detailed ad-hoc analysis of student data, as well secure and appropriate access to individually identifiable student information. This requires that the system includes user-friendly tools that allow for security, ad-hoc query building, snapshots of formative data related to student performance, attendance, behavior and other key data elements, and pre-configured reports that deliver just-in-time data in a fully preconfigured format.

A portion of these grant funds would be used to fully integrate a robust suite of business intelligence tools into the enterprise data warehouse structure. These tools would enable individuals at all levels, from classroom teacher to district administrator, to state superintendent, legislators, parents, community members and others, to access data in such a way so as to inform decision-making related to student achievement and program effectiveness.

Oregon is currently piloting a front-end dashboard tool that will interoperate with various SISs, allowing for uniform training and sustainability by resource pooling. This tool will be leveraged by the Oregon DATA Project. It is currently hosted by ODE and available at no charge to districts. The interface will be customizable at district, school and teacher levels.

Equitable access across the state is also being addressed through a contract with Qwest to establish and expand last-mile connectivity to every school in Oregon over the next three years.

Sustainability Strategies

By deploying a regionally decentralized system of data warehouses, Oregon can leverage regional and local school district resources to sustain the DATA Project.

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Districts will be able to allocate resources for the development and maintenance of regional data systems as well as invest in local professional development resources and reporting tools to meet the needs of their regional public constituencies.

Communication and Training

The success of the Oregon DATA Project largely rests with the involvement of all of the stakeholder groups in the Oregon education system. A comprehensive communications plan will precede the major work on this initiative, and continue for the three years of the project and beyond. The project's communications director will design a series of strategies that align to the unique needs of each group, whether that be a cost analysis presentation to the business community, an interactive forum for community leaders, or an informational session for legislators.

At the state level, educators will be introduced to the Oregon DATA Project through presentations at six conferences and two summer institutes currently hosted by ODE. Attendees will be presented with an overview of the project as well as information on how to obtain training. National education associations such as the Association of Supervision and Curriculum Development (ASCD) and their state chapters will be approached with offers of presentations as well. That initial strategy could reach as many as 20% of Oregon's educators, as well as state and national association members.

At the regional and local level, professional development will be offered by curriculum directors serving on the Instructional Leadership Council (ILC). These certified trainers will serve school district staff, and also coordinate all the training and professional development activities to other stakeholder groups within their regions, such as student, parent and community groups.

Trainers will work with regional warehouse ESDs to create Stage 2 training on specific data tools, such as the Dashboard application.

Certified trainers from the ILC will be staged at six regional sites (large school districts or ESDs) chosen to provide geographic coverage of the entire state. The training will be delivered in the format deemed most appropriate for the area, and will include web-based channels as well as face-to-face sessions.

The professional development module of the Oregon DATA Project will follow these three stages:

- **Stage 1: Promotion and information**

This phase will introduce the project and what it hopes to accomplish, promoting the concept that collecting and reporting meaningful data can lead to analysis that helps with student success in a variety of ways. Oregon wants its stakeholders to buy in to the reality that data is important – that its use can help students be more successful, help teachers be more effective, and help parents be more instrumental in their children's education. For teachers, the training will help data teams become an essential part of the school culture, a valuable extension of the work they already do.

It is our belief that school personnel interested in improving the performance of their schools need first to learn how to ask the right kinds of questions that the data has the potential to help answer.

- **Stage 2: Tools**

This second stage of training will provide education to the end users of the system on the data system tools, such as the Digital Dashboard. Users will learn how

best to utilize this suite of tools for data collection, analysis, and generation of individual student profiles and learning plans.

○ **Stage 3: Practical applications**

The third stage of the professional development and training will occur as the system is being piloted and implemented. End users will be shown how to link the analysis information to changes in instruction, with an emphasis on the comparative benefits of formative vs. summative assessment.

Evaluation

The Northwest Regional Educational Laboratory (NWREL) will provide formative and summative grant evaluation services for the Oregon DATA Project. This complex, multi-year project includes: multiple partners and stakeholders developing new and more effective methods of working together; new software and hardware components requiring training and professional development; the implementation of new procedures and/or business rules statewide; and a governance structure to manage this process to achieve an extensive set of goals.

The NWREL evaluation plan will contain formative and summative components. The NWREL team will work closely with the DATA Project on developing a formative evaluation approach that provides timely reviews, reports, and conversations of project processes and effectiveness. NWREL will help develop and review instruments for needs assessments, for measuring effectiveness of communications and governance strategies, and for evaluating professional development and workshop activities. It will also provide expertise in the evaluation and analysis of research and data. Monthly or bimonthly reports and meetings, as appropriate, will be scheduled with the project director or his representatives on these activities and strategies.

The summative evaluation plan will be based on a customized logic model examining the project context, the resources (software and hardware being developed and purchased), the strategies and activities of the DATA Project, analysis of the outcomes, and assessment of the impacts of the long-term goals.

The summative evaluation will focus on the goals the project has outlined that will occur at the federal, state, regional, school, community, and research levels. A variety of appropriate evaluation methodologies and instruments will be used to measure the extent to which these goals have been met, relating back to the user requirements resulting from the business analysis.

A formal summative evaluation report will be provided at the end of each project year, with timely updates provided in meetings and communications with the project director.

On this project, all of the major ODE participants are facile with a wide range of technologies that allows communications, resource sharing, and research and analysis to occur efficiently. NWREL has extensive technology capability and will make effective use of these in developing and implementing the evaluation plan.

The work of the NWREL will be supported by the International Society for Education Technology and the EESC Peer Review Subcommittee.

3. Project Personnel

The following key personnel participate on the Educational Enterprise Steering Committee (EESC), a permanent panel formed two years ago as a result of Oregon legislation mandating core services provided by Oregon's Education Service Districts. The EESC works across all sectors of the enterprise to identify and address common priorities and goals of Oregon educators and students. As part of its charter, the EESC funded directors' positions in core service areas, including School Improvement, Technology and Administrative Services. Mickey Garrison, Leslie Golden and Bob Burns serve in these positions, respectively. They work collaboratively on various programs where technology supports and facilitates school improvement efforts, and this data quality initiative is the primary focus of their collaboration.

Golden and Garrison coordinate the efforts of the EESC's Data Quality Work Group (DQWG), which holds primary responsibility for the development, implementation, and sustainability of the Oregon DATA Project. The work group comprises representation from the Governor's Office, Oregon Department of Education, ESD Superintendents, K-12 district Superintendents, the Oregon University System (OUS), and community colleges.

In the following paragraphs, we identify key players and their roles and responsibilities regarding the data project, as well as the percentage of time they anticipate devoting to it during the next three years. Full resumes follow the Project Narrative.

- **Project Sponsor:** Doug Kosty, Oregon Department of Education (b)(4) dedicated time in each of three years).
- Mr. Kosty is currently the Assistant Superintendent of the Office of Assessment and Information Technology at the Oregon Department of Education. As sponsor of the Oregon DATA Project, Mr. Kosty will provide overall leadership for all phases of the initiative. Mr. Kosty was a key developer as a KPMG Project Manager for the Oregon Database Initiative Project (DBI), a revolutionary advance in the coordination and implementation of an educational data system. As the Project Manager, he was responsible for directing the technology development of the project while overseeing the KPMG staff assigned to the project.
- **Project Manager:** Baron Rodriguez, Oregon Department of Education (b)(4) dedicated time in each of three years).
- Mr. Rodriguez will be responsible for providing overall management of the project, overseeing all project activities and project planning, scheduling, reporting, contract management and risk management. Mr. Rodriguez has extensive IT experience specializing in multi-agency/cross jurisdictional projects, providing IT leadership, project management and building strong technology teams. Mr. Rodriguez provides leadership to the Information Technology Division, which has a staff of 38 technology professionals and a biennial budget of over \$7 million. The staff provides data collection applications and support statewide to over 212 school districts and ESDs and maintains data on nearly one million students in Oregon. This year, ODE development staff has successfully delivered a brand new application, namely the Staff Level collection. This collection is extremely complex and will

Oregon Department of Education

provide data on every staff member at the districts, allowing the federal government and state policy makers to make informed decisions regarding the achievement of students down to the classroom level.

- **Project Functional Lead:** Mickey Garrison, Education Enterprise Steering Committee (b)(4) dedication of time in each of three years).
- Dr. Garrison is the School Improvement Director for the Education Enterprise Steering Committee. As the full-time functional lead of the Oregon DATA Project, Dr. Garrison's duties will include overseeing all aspects of the training and professional development segments of the plan. She will work collaboratively with the project director and the EESC work group to develop assessment measures for districts to gather information on their current data sources. She will co-develop training of all three phases of the professional development module and will provide information to the field via regional meetings and conferences about data training opportunities. Dr. Garrison has more than 30 years' experience in the education field, as a teacher, administrator, consultant, and researcher with special expertise in data collection and analysis.
- **Project Technical Lead:** Leslie Golden, Education Enterprise Steering Committee (b)(4) dedication of time in each of three years).
- Ms. Golden is the Technology Director for the Education Enterprise Steering Committee. As the full-time technical lead of the Oregon DATA Project, Ms. Golden's duties will include overseeing all aspects of the technical details surrounding the regional warehouses, including analysis, design, testing and implementation. Ms. Golden is a project director with five years' experience in education technology and 15 years' experience in litigation case management.

In addition to these key staff members, the Oregon Department of Education plans to hire a **Communications Coordinator**. This person will be responsible for designing communication strategies that align to the specific needs of the many and varied stakeholder groups in the Oregon education system. The Communications Coordinator will provide oversight and management of the DATA Project's communication and public education outreach efforts. Duties will include developing, planning and implementing statewide communication about the project; coordinating channels such as newsletters and websites; and advising and assisting members of the project on public information activities.

A **Business Analyst** will perform a liaison function between the business side of the project and the functional component, including vendors. Duties will include analyzing the business needs of the Oregon DATA Project, gathering the necessary information to establish project requirements and involving stakeholders in the process.

A **Research Analyst** provided through NWREL will aid project directors in staying current with research that can help inform the project design and implementation, as well as provide details on how data obtained through the Oregon project can be shared through national research channels.

A breakdown of specific personnel resources is provided in the Budget Narrative.

The EESC Data Quality Work Group

A subgroup of the EESC, the Data Quality Work Group (DQWG), will provide primary direction and input into the Oregon DATA Project. Their names and affiliations are below; resumes follow the Project Narrative.

Rod Aust, Willamette Education Service District
Joel Robe, Willamette Education Service District
Mark Endsley, Oregon University System
Mojo Nwokoma, Oregon Department of Education
Rick Wahlstrom, Northwest Regional Education Service District
Ron Enger, Southern Oregon Education Service District
Jay Matheson, Southern Oregon Education Service District
Scott Robinson, Portland Public Schools
Tom Luba, Linn-Benton-Lincoln Education Service District
Tony Alpert, Oregon Department of Education
Vickie Fleming, Redmond School District
Elaine Yandle-Roth, Oregon community colleges

4. Resources

The Oregon educational community has a history of communication, coordination and collaboration as the groundwork for successful projects. Oregon's current resources are no exception. The facilities, equipment, and staff necessary to fulfill Oregon's vision of a statewide longitudinal data system are firmly in place.

Educational Enterprise Steering Committee

The Oregon DATA Project is wholeheartedly supported by the EESC, which will provide backing for development and implementation of all phases of this program under the direction of the ODE. The EESC's ties to all governing sectors also brings statewide support for this initiative from the Governor, state Legislature, and regional and local leadership, ensuring sustainability from both a financial and an alternative resources perspective.

Northwest Regional Educational Laboratory

The Northwest Regional Educational Laboratory (NWREL) was established as a non-profit organization in 1966 with the stated mission of "improving educational results for children, youth, and adults by providing research and development assistance in delivering equitable, high-quality educational programs." Over the last 39 years it has conducted hundreds of evaluations. In the last 15 years, NWREL has had an extensive focus on educational technology-related evaluations and has performed more than 50

Oregon Department of Education

evaluations on a wide range of projects, including multi-year and statewide evaluations. Based on quantitative and qualitative data from a variety of measurement tools and data sources, these evaluations have provided formative feedback to project directors and summative reports for management and policy audiences on the impacts of technology.

Instructional Leadership Council

The ILC is a school improvement consortium comprised of a curriculum director from each ESD. It serves as the direct link between K-12 education and the Oregon Department of Education. ESD curriculum directors meet monthly with K-12 directors and conduct ongoing site visits to schools within their region, which provides them with first-hand knowledge of what the needs are in the field. Curriculum directors serving on the ILC will be the certified trainers that provide Oregon DATA Project training to school district staff, and will coordinate all the training and professional development activities within their regions.

Washington partnership

Oregon and Washington are working closely together to design complementary longitudinal data systems. The programs will be tailored to fit the individual needs of each state, but the exchange of data across the border is a chief design concern. Although each state's project will be funded separately, the two states will be comparing progress throughout the development process to ensure that ideas and lessons learned are shared by the two states.

Connectivity

ODE has just signed a deal in principle with the state's largest telecommunications company to establish and/or expand connectivity bandwidth to every school in Oregon within the next three years. Strategic grants provided through ODE in concert with this contract will make it possible for the have-nots to finally employ bandwidth for improved instruction (via access to tools and data), and more equitable access to education opportunities for students. Teachers and administrators will be able to access and use data without interrupting critical student access to 21st century skills and information.

Web-based tools

The ODE and EESC are currently piloting a fully vetted web-based tools set that will interoperate with a number of student data systems to allow teachers and administrators to extract and view student-level data in a digital dashboard, which is scalable to accommodate other SISs and BISs. This tool set and portal is being hosted and supported at no cost to users. Individual districts will also be able to host this independent of the state in their own instance, and cost for maintenance will shift to them. This tool set and application is worth upwards of \$2 million, but districts will pay nothing beyond the cost of financing local IT interoperation costs.

Training portal

The Oregon Virtual School District is a web-based portal to online courses, digital content, and tools for students and teachers to seamlessly integrate technology into teaching and learning. Most of the courses and all of the tools are free to users. OVSD provides teachers and educational professionals with an online professional development workspace and repository. It is developed and will begin housing online modules, accessible 24/7 across the state, within the next two months. All levels of trainings that will be developed to support the DATA project will be deliverable through this online environment, and will be an integral part of creating equitable access to program support.

5. Management Plan

A timeline for development and implementation is included in Appendix A. The timeline describes major tasks to be completed, milestone dates, and personnel responsible for each.

Project Sponsor—The Oregon DATA project sponsor is Doug Kosty, the Assistant Superintendent of Assessment for ODE. Mr. Kosty serves on the Education Enterprise Partnership, which unites K-20 education across the state of Oregon. (b)(4) of time each year; in-kind (b)(4)

Project Management—Baron Rodriguez, certified Project Management Professional (PMP), is the Chief Information Officer for the Oregon Department of Education, and will provide project leadership. Mr. Rodriguez will ensure the project deliverables provide direct benefit to help inform data-driven decision-making through longitudinal data provided through this grant opportunity. (b)(4) of time in each of three years; (b)(4)

Technical Leadership—Mojo Nwokoma, Director of Enterprise Data Systems Architecture (KIDS project) will provide technical guidance to ensure the needed technical infrastructure and data elements are provided as part of the KIDS project and to avoid duplication of effort. (b)(4) of time each year; (b)(4)

Higher Education Coordination A third leg of support in the planning and development of the interoperable state/regional warehouse system is Mark Endsley, of the Oregon University System. Mr. Endsley brings expertise in the design and implementation of Oregon’s Higher Education data systems (IDTS and ATLAS), and will contribute towards the long-term goal of full data transport across the K-20 enterprise. In-kind contribution: (b)(4) of time in each of three years)

LEA Expertise/Coordination—As discussed above, the EESC funds director’s positions in school improvement and technology to help coordinate and drive statewide resources and programming to Oregon’s 198 school districts, through interagency collaboration between ODE, the ESDs, and other key stakeholders. As directors for the EESC, Leslie Golden and Mickey Garrison are driving the Oregon DATA project, and

Oregon Department of Education

will serve as co-directors. Golden and Garrison coordinate and facilitate the efforts of the Data Quality Work Group, which holds primary responsibility for the development, implementation, and sustainability of the Oregon DATA Project. The work group will provide direction and immediate oversight for the following contributors:

- Responsibility for statewide project communication and the provision of administrative support to the project, will come from **EESC**. Communication efforts will include consistent maintenance of content on the information website, development of “promotional” materials, and coordination of regional meetings to discuss project roll-out, etc. Northwest has committed print shop resources, and partial FTE for this role. In-kind contribution: (b)(4)
- Responsibility for IT statewide support and coordination will come from the **Oregon Department of Education**. ODE will competitively release support and technical expertise through a request for proposal process. Oregon has ample high quality resources available within the Enterprise of Education to assist the SEA with meeting the deliverables of this proposal. ODE also brings a fully developed and supported web-based portal and tool set, which will be integrated for school, district, and ESD use to collect and analyze formative data, and to host digital dashboards for every teacher and administrator in Oregon. These offerings are already live and being piloted. Training will begin this summer for initial roll out to early users. These tools are available at no cost to users, and maintenance costs are covered through separate state funding. In-kind: (b)(4) (b)(4) portal from Microsoft; ODE (b)(4) for initial development.
- Responsibility for school improvement and assessment input will come from several key contributors: **Scott Robinson of Portland Public Schools** is directing the most advanced data-driven instruction model in the state, and his willingness to bring his commitment and learning to bear on development of a statewide model is invaluable to the success of our project. **Tony Alpert of ODE** brings deep and expansive knowledge of state and federal assessment requirements and process, and is ardently in support of this push to increase the collection of formative data elements, and to improve staff capacity to analyze this data and convert it to improved individual instruction. In-kind: (b)(4) of each person’s time in each of three years).
- Responsibility for research, evaluation and continuous improvement will be shared and coordinated between **Northwest Regional Education Lab**, **International Society for Education Technology**, and a **Project Evaluation** subcommittee of the EESC. In-kind: (b)(4) office support; grant: Year 1 (b)(4) Year 2 (b)(4) Year 3 (b)(4)

When primary field research has been collected and aggregated, it will be used by the Data Quality Work Group to develop final goals and objectives for the Oregon DATA Project. Once those objectives are established, evaluation metrics will be identified and recommended by DQWG with input from school districts and NWREL. This project cannot succeed on a statewide deployment if it is not intentionally devised as a flexible, responsive system. Therefore, implicit in the plan above and model below is that these contributors, at all levels and phases of project development and implementation, are committed to a highly collaborative, cooperative, and dynamic feedback process.

Oregon Department of Education

Figure 3: Management Model

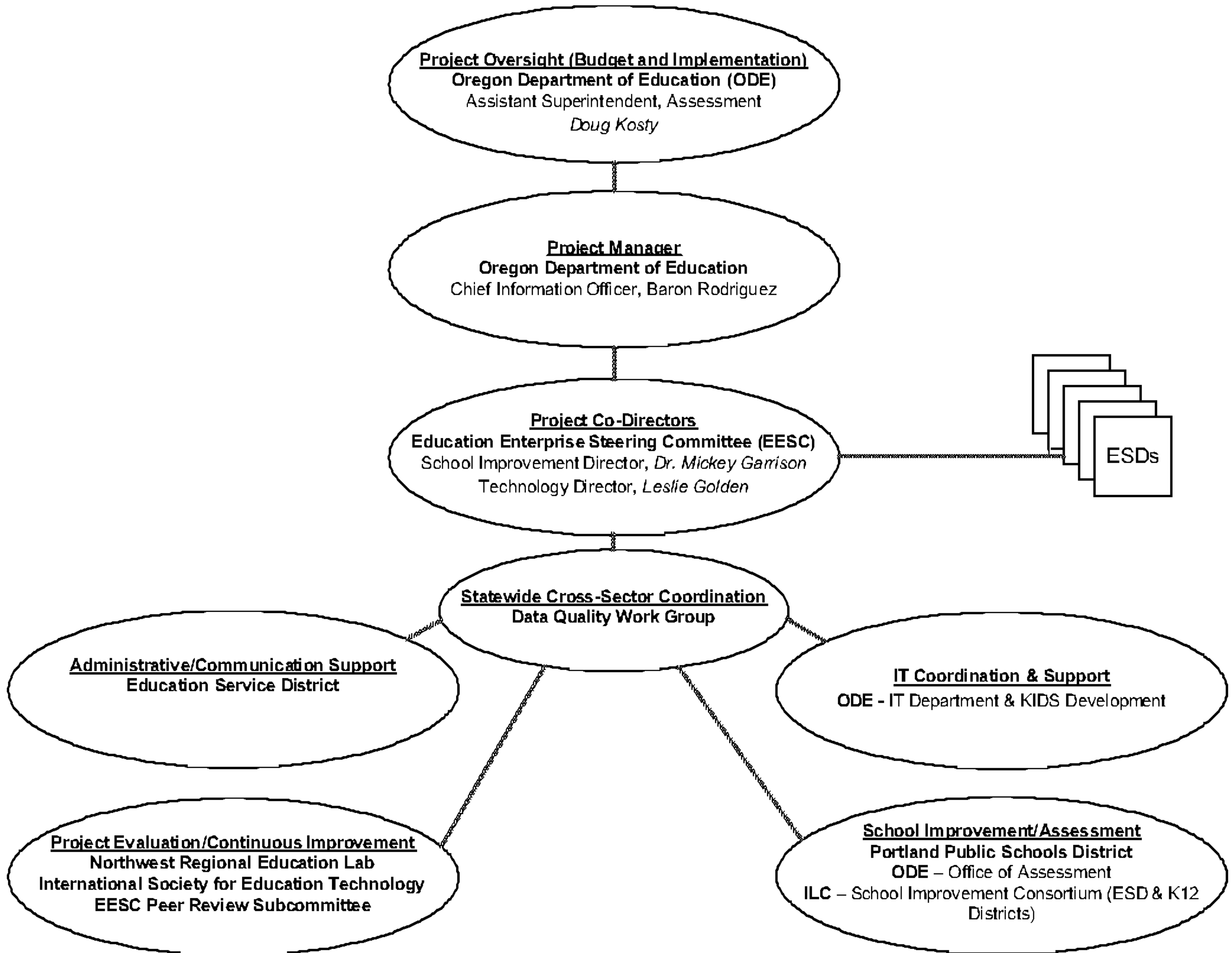
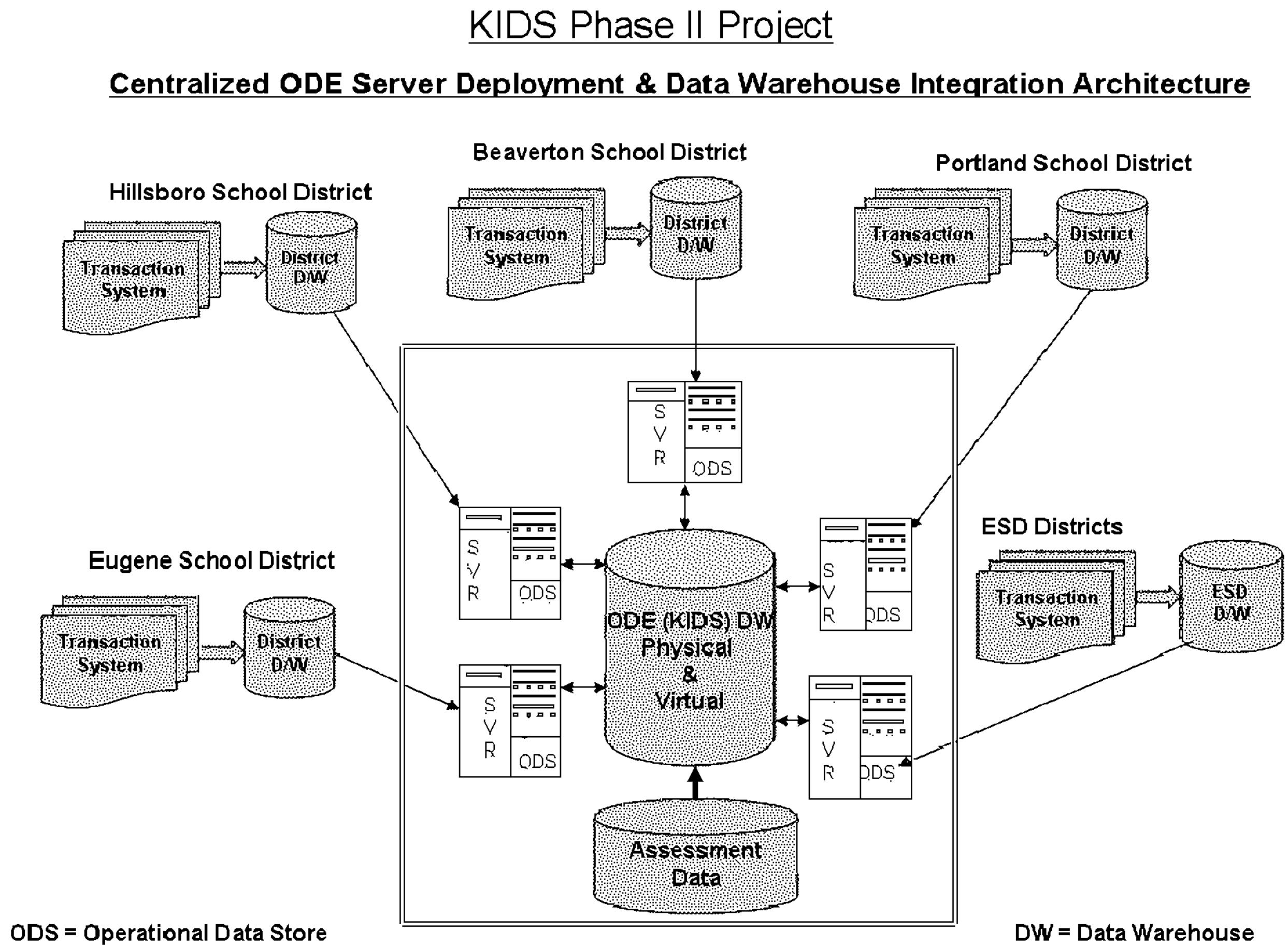


Figure 4: KIDS Phase II



Oregon Department of Education
Oregon DATA Project: Direct Access to Achievement

Resumes of Key Personnel

(b)(6)

doug.kostv@state.or.us

(b)(6)

Doug Kosty

Overview

A skilled professional with a unique combination of large scale assessments, information systems and management experience. His leadership experience includes various state and local governments and private sector consulting specializing in education systems automation.

- Outstanding leadership qualities
- Hands-on experience leading all stages of system development efforts, including requirements definition, design, architecture, testing and support.
- Ability to coordinate and direct all phases of project-based efforts while managing, motivating and leading project teams.
- Adept at developing effective policies and procedures, project documentation and milestones, and technical/business specifications.
- Practiced presenter, both nationally and at statewide conferences

Competencies

Governmental Accounting Standards Educational Finance and Funding

Project Management

Data Collection & Reporting

Cost Benefit Analysis

Research & Development

Contingency Planning

Financial Management

Data Integrity & Recovery

Risk Assessment

Business Impact Analysis

Strategic Planning

Administration of Large Scale Assessments

Experience

2002 – Present

Oregon Department of Education

Salem OR

ASSISTANT SUPERINTENDENT OF ASSESSMENT & INFORMATION SERVICES

Directs the work of a diverse management team overseeing assessment and information services of the Oregon Department of Education (ODE). The Office of Assessment and Information Services supports ODE roles of accountability, leadership and school improvement through the development and maintenance of a technical and information infrastructure. This infrastructure has two major components. The first component is represented by data collection from and reporting on Schools, Districts and Educational Service Districts (ESDs). Additional components of this diverse unit include; Information Services Technology, and Customer Systems. Responsible for budget preparation and contract management and long term planning for implementation of newly developed finance and technology applications.

Accomplishments include:

- Published over 150 different test forms and administered 1.5 million assessments using multiple formats across several content areas to over 300,000 students in 1,200 schools per year
- Districts now have relatively immediate access to data rather than waiting several months for paper packets to be shipped.
- Reduced the amount of time for reporting student results to school and district staff from months to hours and improved data security
- Improved software development and prioritization environment to improve quality and timeliness of data collection and reporting
- Improved help desk support for thousands of data collection customers
- Consolidated and updated database, web and file servers resulting in 99.99% web server uptime
- Saved the state approximately \$300,000 per year in printing and shipping costs by developing and implementing a secure web-based reporting infrastructure.
- Developed innovative contracts to train and support school and district staff in administering and scoring assessments thereby reducing the number of contracts from 12 to 3 and reducing the number of temporary employees by 1200

Under Kosty's leadership the Office of Assessment and Information services has build credible working relationships with the Federal Government in the following areas:

- Created Technical Assessment Advisory Committee (TAC) comprised of national experts to assist in bringing Oregon's Assessment into full compliance with federal requirements

- As part of Federal Peer Review ODE conducted studies of assessment technical adequacy
- Contracted with American Institutes for Research to develop 500+ page technical assessment manual
- Conducted stakeholder workgroup to validate assessment achievement standards

1997 – 2002

KPMG Consulting

Sacramento CA

Manager

Managed projects, personnel and budgets for one of world's leading Information Technology Consulting firms. Directed strategic planning efforts, established and reviewed mission, vision, goals and objectives. Supervised project and practice staff including, interviewing and hiring, technical education and training, developing work plans, establishing employee performance guidelines and evaluating employee performance, and processing disciplinary actions. Served as an active participant on National K-12 Educational practice and served in leadership role on the following projects:

- Oregon's Database Initiative Pilot and Statewide Implementation
- Integrated Performance Benchmarking System (IPBS) Test of Concept for US Department of Education Performance Based Data Management Initiative (PBDMI) and Education Data Exchange Network (EDEN)
- Colorado Springs District 11 Performance Plan
- Virginia Department of Education Special Education Child Count Project

1995 – 1997

Montana Office of Public Instruction Helena MT

Director, Information Systems Development

Plan, administer and control all activities of the Information Systems Development Division including software and hardware training, data processing, applications development. Served on the Technology Advisory Committee to plan for computer operations, telecommunications, local area and wide area networks, statewide educational networks, forms management, data administration, and systems security. Prepared budget requests and managed division budget.

1990 – 1995 Montana Office of Public Instruction Helena MT

Fiscal Services Specialist

Responsible for establishing and maintaining standard accounting and reporting practices in all Montana public school districts.

Researched official accounting pronouncements and promulgating accounting policies for Montana School Districts; providing school district personnel, county superintendents and county treasurers with technical accounting and reporting assistance.

Responsible for compiling and reporting school district financial information; and monitoring and reporting school district compliance with the Single Audit Act.

Education

Montana State University

Bozeman MT

Bachelor of Science Business/Accounting

Profession

Memberships

Education Information Management Advisory Committee of the Council of Chief State School Officers

Forum Representative of the National Center for Education Statistics

Baron Rodriguez, PMP, MBA

Objective To obtain a job that will utilize 12+ years of experience in a variety of areas in IT and business management.

Education/Certifications George Fox University Portland, OR
Masters of Business Administration
Western Baptist College Salem, OR
Bachelors of Management and Communication.
Project Management Institute Newtown Square, PA
Project Management Professional # 30867

Experience 2/2003 - Present OR Dept. of Education Salem, OR

CIO/IT Director/Network Manager

Responsible for developing, managing, maintaining, supporting, and protecting the information resources and information technology systems and applications that support agency business processes and aligning the agency's information technology with the business strategy of the state.

Responsible for Windows 2003/SAN data center providing access to student data for over 600,000 students to 1200 schools statewide.

Supervise and coordinate activities of 38 application development, database development, helpdesk, outreach, and network staff. Network staff specializes in supporting Windows 2003 in clustered Dell EMC SAN environment. Development staff specializes in .Net/SQL development.

Consolidated Dell server farm & reduced server/software costs by 50% while increasing uptime to 4 9's by implementing Dell blade and SAN (CX 400) technologies and replacing aging mixed network infrastructure with CISCO switches and routers.

Prepare Requests for Proposals, and administer multi-million dollar contracts. Ensure contractors meet deliverables and timelines. If necessary, prepare contract amendments, and renegotiate timelines and deliverables.

Administer multi-million dollar budget. Prepare biennial budget projections for infrastructure and development costs.

Develop statewide IT policy. Serve on the State IT Security taskforce and serve as the agency Chief Security Officer. Write and enforce agency security policies and procedures. Maintain security of confidential/sensitive student and staff data. Develop PC, system development and server lifecycle plans.

1/2001 – 2/2003 Project Mgmt Office – Admin Svc. Salem, OR

Enterprise Project Manager

Responsible for leading multi-agency, large scale state-wide projects.
Responsible for applying project management standards to projects, including

examining processes and risks and making go/no-go decision.

Project Manager for 1st state-wide open source platform project. Led team of JAVA developers and Oracle DBA's to create successful Web-based legislative bill tracking system. Project had very short timeline and required consensus building with nearly 20 different agencies.

Project Manager of Public Safety Data Warehouse. Project was a criminal justice multi-agency data integration effort.

8/1997 – 1/2001 Secretary of State Salem, OR

Business Analyst/Senior Technical Analyst

Met with clients to determine system needs to develop business requirements; determined scope of projects; estimated project costs and established deadlines; prepared written documentation and made oral presentations to management team on ways to improve Information Systems. Conducted cost-benefit analysis, feasibility studies, procedure and business process analysis.

Met with agency stakeholders to identify need for agency-wide help desk, obtained requirements, developed service level agreements (SLA's) and built consensus among stakeholders. Analyzed agency needs and procured help desk system for the agency. Implemented help desk solution, worked with contractors to develop code for database and customize application for agency.

9/1996 – 8/1997 Dept. of Revenue Salem, OR

Computer Operations Specialist

Selected by management to manage Help Desk & Asset Management procurement. Responsible for developing solution for complex cross-divisional issues with tracking computer equipment. Tested and selected Help Desk System software to be implemented division-wide. Received company's highest sales award four years in a row.

2/1994 – 8/1996 United States Army San Antonio,
TX

Data Center Shift Supervisor

Supervised shift of large-scale payroll processing data center

Responsible for developing conversion plan and training plan for new military messaging system. Designed plan to be used for any future software updates. Analyzed issues with conversion and addressed issues with senior management. Developed contingency plans for conversion to allow for communication between agencies during changeover period.

Held Top Secret (SCI) clearance for access to data at base communications center.

MOJO CY NWOKOMA

(b)(6)

Work: 503-947-5752

(b)(6)

(b)(6)

Professional Objective

Senior management-level position making use of my expertise and experience in information technology program/project management, and business development/strategic planning functions.

Summary of Qualifications

Offer Advanced Degrees in business and economics, with 18 years of professional accomplishments in:

- Business development & strategic planning
- Market research & competitive intelligence
- IT Program/project management
- Business process re-engineering
- Data Warehouse design & development
- Business intelligence (OLAP) systems
- Vendor management
- Data quality assurance programs

A highly creative, disciplined, and goal-oriented professional with demonstrated strength in delivering on strategic business and technology planning solutions, including information development and delivery architecture, IT projects and program management, business forecasting and demand management. Highly organized with the ability to manage multiple and competing projects while satisfying delivery deadlines and budgetary guidelines. A results oriented team player with strong work ethic, and a commitment to individual and team recognition awards for successful projects. Possess exemplary communication and presentation skills, and have received several managerial awards for creativity, resourcefulness, persistence, commitment, and overall professionalism.

Experience Highlights

Oregon Department of Education, Salem

2007

Director, K12 Integrated Data System (KIDS) 2005 to date

Responsible for directing and supervising the development and implementation of a state data warehouse for integrating students' information systems across 200 school districts in the state of Oregon. This position is accountable to the Assistant Superintendent of Education, and includes the development of state-wide policies regarding Privacy, Security, and Use of students' data. Serve as a liaison to district and regional chief information officers to assure respective warehouse interoperability with the KIDS project, while maintaining privacy, security, data quality, and timely exchange of data and reports within the state education enterprise.

Key accomplishments include:

- **Successfully developed KIDS phase II Request For Proposal (RFP), evaluated vendor responses, and awarded the data warehouse development and quality assurance contracts to qualifying vendors, utilizing Justice Department lawyers for legal sufficiency requirements.**
- **Designed and implemented a distributed data warehouse architecture and infrastructure consistent with local school districts requirements for data quality, security, privacy, ownership, and use.**
- **Successfully developed and deployed enterprise level data dictionary (Metadata) repository, key to data standardization and record exchange across the enterprise.**
- **Organized project governing board members drawn from public and private sector educational stakeholders in the state, and provide quarterly project status update and feedback from them.**
- **Established a good working relationship with Governor's office and the department of administrative services (DAS) to develop and support quarterly project status updates to Joint Legislative Committee for Information Management & Technology (JLCIMT), including the development of policy options package (POP) for the subsequent phases of the KIDS project.**

MOTEK GROUP, LLC, Portland, Oregon

2005

Owner & Principal Consultant, Data Warehouse Practice 2002 to 2005

Responsible for business development strategies, while providing leadership in marketing Motek warehouse practice and project management services to existing and prospective clients in the Pacific Northwest. Developed partnership relationships with local IT services providers, and jointly responded to State and Local government bid proposals for information technology projects.

- **Achieved \$4.5 million dollars in State awards for warehouse infrastructure and disaster recovery projects.**
- **Developed off-shore partnership relationships, while assuring quality and timely deliverables to our clients.**
- **Developed and implemented strategic and operational business planning and budgetary process for revenue maximization and profitability.**

NIKE, INC., Beaverton, Oregon

1996 to 2002

IT Director, Business Intelligence Program 2000 - 2002

Managed a technology center of excellence (COE) for enterprise data warehouse report development and testing, including delivery platforms and deployment portals. Performed on-site product tests and "proofs of concept" (POC), including ROI analysis for tool acquisition decisions.

- **Deployed Informatica ETL (Extract, Transform, Load), Actuate data quality program, Microsoft Analysis Services Server for multi-dimensional OLAP, and Computer Associates Platinum for metadata repository. Created specifications for systems and application tools to meet business requirements.**
- **Centralized and streamlined tool acquisition program, and achieved \$5 million dollars savings in software licensing and maintenance fees.**

- **Consolidated and standardized enterprise OLAP clients, including Business Objects, Brio, Microstrategy, SAP Bex, and Crystal decisions. Saved \$1.7 million dollars in annual training budget.**
- **Aligned business and IT goals and enforced best practices for enterprise report development and delivery through proactive training, process re-engineering, and commitment to continuous quality improvement.**

Manager, Nike Corporate Information MIS Programs & Projects 1996 -2000

Demonstrated expertise in managing multi department matrix organizations, and successfully delivered on complex management information projects. Established and monitored project timelines, performance matrices, and results reporting to program management office (PMO). Managed a staff of 17 analysts and developers, including project leads, data modelers, and annual budget of \$7 million dollars. Experience in leading multiple project teams and resources, including contractors, consultants, and vendors, while successfully planning and tracking development projects through all phases of the project lifecycle.

- **Provided leadership roles in partnership with other IT and business team members to plan, prioritize, and implement Siebel (Sales force automation), and I2 (Integrated demand planning) systems for Nike supply chain program.**
- **Successfully deployed Brio and SAP Business Warehouse reporting solutions for the premier SAP implementation and reporting in Nike Canada.**
- **Implemented Microstrategy Olap, and supported global sales operations with timely and accurate integrated sales forecasts and production planning tool.**
- **Achieved 12% revenue growth, 25% sales productivity, and 15% in sales cycle-time reduction in fiscal year 1999. Received management recognition award for the 1st successful tool deployment for global reporting and forecasting at Nike.**
- **Directed Nike World HQ Sales Server consolidation project, and upgraded network for enhanced data throughput to regional sales offices.**
- **Outsourced consolidated sales server and network maintenance, including administration and support to Lock-heed Martin. Achieved a projected 5 years savings of \$5 million dollars in new hardware and maintenance cost.**
- **Provided data management consultations on developing intelligence knowledge base, and created specifications for warehouse distribution systems report development and integration with SAP module.**

IBM (formerly Sequent Computers, Inc)

1990-1996

Manager, Strategic Planning and Business Development 1994 -1996

Developed strategic business alliance programs with 3rd party Unix developers and hardware OEMs, and generated \$17 million in new revenue during the two-year period. Provided market and competitive analytic input to two successful strategic business acquisitions in 1995. Managed competitive market research program and supported product marketing with input on "time to market" opportunities and competitive positioning. Interfaced with IDC and The Gartner Group to position Sequent competitively for the introduction of highly successful NUMA-Q in 1996.

Manager, Order Fulfillment and Sales Forecasting 1993-1994

Implemented accurate booking and shipment forecasts by building backlog system. Designed sales discount and commission strategy to linearize monthly product shipment, while building stronger sales pipeline. Successfully managed a supplier management project team and achieved the following results:

- **\$21 million dollars reduction in excess inventory.**
- **25 % reduction in sales force turnover and substantial improvement in product revenue and margin.**
- **27% gain in manufacturing cycle-time reduction and 35% improvement in shipment forecast accuracy by applying Oracle's financial and manufacturing licensing revenue as sales forecast leading indicator.**

TEKTRONIX, INC., Beaverton, Oregon

1983 to 1990

Manager, Business Planning & Analysis, International Operations 1986-1990

Conducted market research projects for joint venture business initiatives in Asia-pacific region. Developed business plans and managed product portfolio for Sony-Tek joint venture. Managed the liaison office in Beaverton, and handled on-going management of technology transfer to Sony (representing \$9 million in yearly revenue). Performed global factory capacity utilization studies, and developed plans for consolidating aging plants. Performed quarterly review meetings in Europe and Asia for maximum local subsidiary input.

Market Research Analyst, Corporate Information 1983-1986

Conducted competitive primary market research, and contributed to solidification of Tektronix dominance in test & measurement equipment market. Implemented a global Oscilloscope market database and a computer-aided forecasting and reporting package applications (TCAFS) for monthly and quarterly market tracking, reporting, and forecasting. Implemented SAS planning/analytical package and substantially improved subsidiary and consolidated revenue forecast accuracy.

Published quarterly "State of Tek Market Place," a competitive market share newsletter.

Education:

PORTLAND STATE UNIVERSITY, Portland, Oregon 1982

M.S. Applied Economics (Econometrics)

University of Pennsylvania, Philadelphia, Pennsylvania 1980

B.S. Business/Economics

Technical Knowledge

Data: Architecture, ETL (Extract, Transform, & Load), Business Requirements Capture, Data Quality, Dimensional Modeling, Mapping, Integration, and Tuning.

OLAP Clients: Microstrategy, Brio, Business Objects, Cognos-Powerplay, Crystal Decisions, SAP Bex

OLAP Servers: SQL Server 2000 Analysis Services, Oracle Express & 9i Olap, and IBM-DB2 Olap

Databases: Oracle, Sybase, Informix, DB2, Teradata, and SQL Server.

Operating Systems: DOS, Windows NT/2000/98/XP, VMS, Unix (Sun, HP, Sequent)

Applications: MS Office Suite, Case Tools, CRM, DB, DSS, Java, XML, Network/Systems Management, Microsoft Project 2000, Enterprise portals, RAS, KM, and Workflow/Document Management.

Networking/Protocols: LAN, WAN (NT, IBM); TCP/IP, SNA

Communications: Frame Relay, ATM, T1/T3, ISDN, EDI, DSL, and PBX.

CERTIFICATIONS:

OLAP Infrastructure & Architecture Development

The Data Warehouse Institute, Seattle, Washington

Enterprise Decision Support System Planning & Implementation Strategies

Intelligent Enterprise Seminar, San Mateo, California

Project Lifecycle & Process Management

Computer Associates, Alameda, CA

Business Development and Operations Research

Stanford University, Palo Alto, California

Instructor, International Business and Economics

Portland Community College

VITA

Mickey Garrison

PERSONAL INFORMATION:

(b)(6)

(b)(6)

GRADUATE AND UNDERGRADUATE SCHOOLS ATTENDED:

University of Oregon
University of Wisconsin-Milwaukee

Degrees Awarded:

Doctor of Philosophy
1992, University of Oregon
Master of Science
1985, University of Oregon
Bachelor of Science
1974, University of Wisconsin-Milwaukee

Areas of Specialization:

Data collection and analysis
School-wide discipline and responsibility
Classroom management for general and integrated settings
Individual behavioral strategies for difficult-to-teach students
Coaching - Building capacity within schools using support staff

PROFESSIONAL EXPERIENCE:

School Improvement Director, Education Enterprise Partnership, State of Oregon, 2006 - present
Elementary School Principal, Fullerton IV Elementary School, Roseburg Public Schools, Roseburg, Oregon, 2003-2006
Educational Consultant, Director of Educational Support Services, Roseburg, Oregon, 1988-present

District Behavior Coordinator, Roseburg Public Schools, 1998-2000

Assistant Coordinator, Resource and Parent Consultation Training Programs, Department of Teacher Education, University of Oregon, Eugene, 1988-91

Supervisor of Behavioral Programs, Portland Public Schools, Portland, Oregon, 1988-89

Supervisor of Behavioral Programs, Clackamas Educational Support Services, Marylhurst, Oregon, 1986-88

Behavioral Consultant, Douglas Education Service District, Roseburg, Oregon, 1984-86

Instructor of Adult Basic Education, Umpqua Community College, Roseburg, Oregon, 1982-84

Phoenix Alternative School, Roseburg, OR, 1980-82

Elementary Resource Room & General Education Teacher, Fullerton Elementary, Roseburg, Oregon, 1976-80

Teacher for Elementary Seriously Emotionally Disturbed Youth, Monroe Elementary, Milwaukee, Wisconsin, 1974-76

Other Professional Activities:

Congressional Testimony, "Integration of Curriculum and Student Achievement," Education Committee, No Child Left Behind, May, 2006

Mathematics Symposium-"The Magic of Math", George Lucas Education Foundation, October, 2005

Schools of Distinction, Mathematics Achievement Award, Intel & Scholastic, October, 2005

President of the Council for Exceptional Children, Oregon Division, 1986-89

Member of the Council for Exceptional Children, National, 1980-present

Member of ASCD, 1985-present

Publications & Training Materials

Garrison, M. & Sprick, R. S. (2002). Analyzing Conduct Through Technology (ACTT), Roseburg, OR: SofTech Education Solutions.

- | Garrison, M. & Neyhart, S. (2002). Just the Facts: Using technology to understand data. *Journal of Educational Technology*, Fall (2002).
- | Sprick, R. S., & Garrison, M. (2002). Foundations: School-wide Policies and Procedures. Longmont, CO: Sopris West.
- | Sprick, R. S., & Garrison, M. (2001). Make your school's hallways safe and secure : Part 1. Inside School Safety, 5 (11), 9-11.
- | Sprick, R. S., & Garrison, M. (2001). Practical advice to make your school's hallways safe and secure: Part 2. Inside School Safety, 5 (12), 1, 6-7.
- ± Sprick, R. S., & Garrison, M. (2000). Para Pro: Supporting the Instructional Process. Longmont, CO: Sopris
- ± Sprick, R. S., & Garrison, M. (1998). CHAMPs: An Instructional Approach to Classroom Behavior. Longmont, CO: Sopris
- | Sprick, R. S., & Garrison, M. (1993). Interventions: Collaborative Planning for Students At-Risk. Longmont, CO: Sopris West.

LESLIE GOLDEN

(b)(6)

**STATE EDUCATION TECHNOLOGY DIRECTOR
OREGON EDUCATION ENTERPRISE**

Project director with 5 years' experience in education technology, and 15 years' experience in litigation case management. Highly successful project director and resource manager, working between public education agencies and institutions (K-20) across the state, bridging communication, identifying top technology priorities, and developing and supporting sustainable programming to satisfy those priorities. Bi-lingual: English and Spanish. Strengths:

- **Cross-Agency Relationships** – Work with and between Oregon Department of Education, all twenty Education Service Districts, Office of the Governor, Oregon Higher Education and Community Colleges, and K-12 School Districts across the state to establish common priorities in education technology and to build collaborative teams to identify and develop program solutions.
- **Public/Private Partnerships** - Build and expand partnerships to bring resources and opportunity to Oregon education enterprise. Leverage relationships and resource commitments to demonstrate program viability, and to ensure sustainability with public/private funding.
- **Communication** – Drive improved communication efforts across the state on issues of technology, bringing training and conference opportunities to the region, using web-based tools to push information out and to solicit participation and feedback from the field. Emphasis on improving communication between public agencies, to renew collaborative efforts and to capitalize resources through less duplication of effort across the field.
- **Project Direction & Management** – Simultaneously manage various statewide technology projects and programs, including negotiation and implementation of Last-Mile Connectivity contract vehicle; development of Data Quality Initiative program to expand support for collection and analysis of meaningful data to improve teaching and learning; development of statewide, web-based Professional Development programming (tools, content, training); oversight of Oregon 1:1 Pilot.

EDUCATION

Wellesley College, B.A. Political Science (Nationalism and Ethnic Conflict) 1989

University of Seville, Spain, Political Science 1986-1987

PROFESSIONAL EXPERIENCE

EDUCATION ENTERPRISE STEERING COMMITTEE, Salem, Oregon, 2006- Present.
Discussed above.

CLARITY INNOVATIONS, INC., Portland, Oregon, 2003-2006

Consulting firm matching emerging technologies with education needs regionally, nationally and internationally. Clients are school districts, professional education organizations, and corporations, including: Intel Corporation, International Society for Technology in Education, National School Board Association, National Head Start Association, Oregon Department of Education, American Association of South American Schools, et. al.

Business Development

Research, identify, and commence relationships with viable clients and strategic partners, including key political and education leaders regionally and nationally (Oregon Business Council, National Head Start Association, Oregon Superintendent of Schools, Intel Sales & Marketing Group for The Americas, Europe, Asia, the Middle East, Trillion, Inc.)

Client Lead

Client lead for largest client, maintaining and expanding relationships and engagement over two year period. Prepare quarterly scopes of work, manage all resources and projects, provide monthly reporting to client of progress towards deliverable deadlines.

Project Manager

Manage numerous projects simultaneously, at the micro and macro levels, for Clarity and for clients. Includes developing project plans, assessing resource needs, managing resources and deadlines, and rapidly responding to changes in scope or schedule. Includes regular evaluation of work and work product of team resources.

Trainer

Prepare and present ten to twelve trainings annually to national and international, professional audiences in field of education technology. Develop, maintain, and customize all training materials to meet needs of varying audiences.

SEIDL LAW OFFICE, Portland, OR; 2001-2003

GOODWIN, PROCTOR, Boston, MA, 1995-2000

Civil, complex litigation firms with specialties in insurance, real estate, environmental, and multi-district litigation.

Trial Assistant/Case Manager

Manage cases for trial, from intake through settlement or judgment, including research, drafting, forensic investigation, discovery, summary judgment, witness preparation, voir dire, etc. Manage trial teams on larger cases in preparation for litigation, establishing priorities, deadlines and assessing work quality and performance. Equally experienced in State and Federal courts, as well as arbitration and mediation preparation and attendance.

Client Relations

Establish and manage communication and relationship with clients from inception of case and throughout litigation process. Handle all aspects of material communications, including preparation for depositions, trial, and execution of judgment.

Rod Aust

(b)(6)

Summary

Proven innovative, visionary technology and business leader capable of developing and implementing IT initiatives that position the enterprise at the top in a constantly changing and intensely competitive marketplace.

Areas of Expertise

- Business technology planning
- IT infrastructure and architecture
- Resource management
- Sourcing and Strategic Partnerships
- Communication
- Market Analysis

Experience

Willamette Education Service District 2001-Present

Chief Information Officer

Created technology infrastructure that positioned WESD as the premier information services provider for K12 education in Oregon.

Responsible for building information technology infrastructure from the ground up.

Developed a vision for using technology to create enterprise efficiencies.

Created strategic partnerships to leverage and build capacity.

Recruited and retained quality Information Technology Professionals.

Developed strategy to integrate isolated data repositories.

Provided modern data and telecommunication infrastructure for the agency, 21 regional school districts, and over 80,000 customers.

Transformed traditional cost centers into entrepreneurial revenue streams.

Corvallis School District

1998-2001

Chief Information Officer

Transformed a traditional school district into a modern cost effective enterprise through effective technology integration.

Responsible for establishing collaboration and vision between 17 independent schools and offices through the effective use of technology.

Created a customer service center for end users to receive assistance with technology.

Leveraged and created partnerships between the local university, businesses, city, and county agencies, to create efficiencies and cost savings.

Established a modern consolidated data and telecommunications center linking all sites.

Provided custom information systems to create efficiencies.

Deployed midrange fixed wireless broadband solutions to integrate remote sites with central data center.

Managed \$70 million district bond as well as agency budgets to create and maintain infrastructure and services.

Parkrose School District 1996-1998
Director, Information Services
Established a service oriented Information Services Department where none existed before.
Created modern data and telecommunications infrastructure.
Responsible for providing vision and momentum in teachers and staff to collaborate using technology in ways they had not imagined.
Installed and operated first enterprise wide fully integrated data and telecommunications network.
Provided first email system for the district.
Recruited and retained high quality technical and training staff.
Managed \$40 million bond and agency budgets.

OnLine Technologies 1988-1996
Owner, President
Established a full service application development and project management consulting company with over \$1.2 million in revenue. Projects and customers include:

Nike Footwear Distribution: Wrote upgrade module to corporate time and attendance application.
Nike Sports Marketing: Facilitated Joint Application Development Sessions for Nike Staff and third party vendors creating a Work in Progress (WIP) system.
Nike Golf: Managed development staff to create a completely customized inventory management and order fulfillment system.
Tektronix TV Division: ISO 9000 Quality Management Consultant.
CBoard: Micros Point of Sale systems support.

Education

George Fox University BS Education 1988
Oregon Executive MBA MBA Exp. 2008

Professional Affiliations

Confederation of Oregon School Administrators
American Association of School Administrators
Salem CIO Council

Joel Robe

(b)(6)

Objective

To assist school districts and educational agencies in student and school improvement through using data driven decision-making processes.

Experience

2002–Present **Data Solutions Supervisor**
Willamette Education Service Dist. Salem, OR

Oversight of Pentamotion Information Services ASP implementation
Data Warehouse and BI Tools implemented for multiple vendor sources.
Manage internal and external development projects
Sharepoint Portal development for internal and external portals

1984–2002 Various positions
Oregon Total Information Systems
Eugene, OR

Design and development of web-based student information system.
Quality Assurance Lead
Student support lead providing training and support for 70 school districts
Training and documentation development
Developed AVR and AVP accounting work flow processes
AS400 operations

Organizations

Lane ESD Board Member	2005-Present
ODE KIDS Data Warehouse Standards Team Lead	2006-Present
IDTS Transcript Transfer Interface Project	2006-Present
ODE Data Collections Committee Member	2004-Present
Oregon School Boards Association Member	2005-Present
Assoc. of Computing Professionals in Ed. Member	2005-Present
Oregon Assoc of School Business Officials	2000-Present

Education

1974–1977 Mount Mercy College Cedar Rapids, IA
B.A., Business Administration w/ Human Resources and Accounting focus

Prior and Current Coursework

Project Management Professional
Leadership Oregon, Oregon School Boards Association
Cognos Impromptu Administration and Development

Quality Assurance Techniques
Operating Systems

Mark Endsley

(b)(6)

Professional Experience:

2003- Present **Oregon University System, Portland, Corvallis, and Eugene, Oregon**

[Director, K-16 Alignment/PASS (Proficiency-based Admissions Standards System)

project manager responsible for three major OUS efforts: PASS involves alignment of statewide education standards and assessment with college preparation, admission, and other P-20 alignment efforts; the Integrated Data Transfer System (IDTS) is a statewide effort to provide electronic transfer of high school and college transcripts for most Oregon students; and Articulation Transfer Linked Audit System (ATLAS) is a statewide effort to provide internet access to transfer articulation and degree audit information at all Oregon colleges.

1996-2003 **PASS, Oregon University System, Eugene, Oregon**

[Partnership Site Network and Assessment Coordinator:

coach PASS partnership teachers on standards based instruction and assessment; develop and deliver training materials, coordinate and test PASS portfolio assessment system; facilitate system alignment for standards and assessments with the Oregon Department of Education (ODE) and Board of Education; etc.

1996-2002 **Gresham-Barlow School District, Gresham, Oregon**

[Teacher on Special Assignment:

deliver training to teachers across content areas for standards implementation, facilitate curriculum alignment and materials adoption, facilitate GBSD science leadership team, coordinate elementary materials pilot project, etc.

[Oregon Department of Education, Science Content and Assessment Panel advisor:

content panel co-facilitation, co-author of the ODE scientific inquiry and social science analysis scoring guides, planned and implemented the 1998-99 ODE scientific inquiry scoring guide study, facilitated ODE science standards and assessment items development.

1993-1996 **Sam Barlow High School, Gresham, Oregon**

[Science Teacher, Site Council Chair, PASS site coordinator, Assessment 2000 mini grant coach

1987-1993 **Central Junior High School, Pittsburg, California**

[Teacher, Science Department Chair, Scope, Sequence, and Coordination Grant Director, Elementary Science Mentor, State Science CAP (California) Test Reviewer

Other Work Experience:

- Metro Washington Park Zoo, Portland, Oregon: Reptile Show
Trainer/Director
- Marine World, Africa, USA, Vallejo, California: Animal Trainer & Show
Announcer, Land Animals

Education:

Portland State University, Portland, Oregon, Masters. Educational Policy and Leadership
(2002-2003)

California State University, Hayward, California, Single Subject Teaching Credential,
Science (1986-1987)

Oregon State University, Corvallis, Oregon, B. S. Zoology, Graduated with High
Scholarship (1981-1985)

Vita

Alexander Jay Matheson

(b)(6)

541.776.8656 (W)

(b)(6)

jay_matheson@soesd.k12.or.us

Goal

To be a part of the leadership team in a regional educational service agency that supports the authentic learning efforts of teachers, administrators, and students through planning, delivery and evaluation of innovative and effective programs

Work Experience

Southern Oregon ESD 2004-Present

Southern Oregon Education School District
101 North Grape Street
Medford, Oregon, 97501

Supervisor, Technology and Media Services

>Work with and manage multiple teams to support technology and media services to member schools in Jackson, Josephine and Klamath Counties.

CILC 2000-2003

Center for Interactive Learning and Collaboration
251 E. Ohio Street, Suite 960
Indianapolis, IN 46204

Senior Director of Outreach

>Coordinated the efforts of several teams with mixed education and business backgrounds to develop a comprehensive set of national outreach/marketing plans for promoting Interactive Video Conferencing (IVC).

CIESC

1999-2003

Central Indiana Educational Service Center
6321 La Pas Trail
Indianapolis, IN 46268

Distance Learning Coordinator (DLC)

>As Indiana's first DLC, took on the demanding and challenging opportunity to create a new paradigm for distance learning using state of the art interactive video equipment and resources to improve K-12 instruction.

MARESA

1976-2002

Marquette Alger Regional Educational Service Agency
321 East Ohio Street
Marquette, MI 49855

Project Director, Program Specialist, Curriculum Consultant

>Wrote, directed and evaluated more than twenty state, federal and foundation grants to support innovation and school improvement in twelve local school districts. Some of the grants involved other regional centers and some targeted a collaboration that included the entire Upper Peninsula of Michigan (UP).

Higher Education

University of Wyoming
BA Education (Social Studies/English)

Northern Michigan University
MA Education Administration

University of Kentucky
ABD Curriculum and Instruction

Scott Robinson

Chief Technology Officer, Portland Public Schools

8/01- Current, Portland, OR

Mr. Robinson currently serves as the Chief Technology Officer for Portland Public Schools. In his current capacity, Mr. Robinson sets the strategic direction and manages the technology environment for Portland Public Schools, serving over 100 locations, 6,200 employees, 15,000 computer workstations and nearly 50,000 individual student users. In this position, Mr. Robinson has taken primary responsibility for shaping District policy and ensuring alignment between information technology and the educational and business users within the District. This includes managing all technology related policy level issues for the schools, Superintendent and School Board. Accountable for delivery of the District's information technology programs, systems and services, including all enterprise resource software, networking, server hardware, user computing devices, and communications infrastructure.

As part a strategic redesign, Mr. Robinson has directed efforts to upgrade the technology infrastructure to a high bandwidth, VOIP capable design. Developed and directed District strategy to rebuild previous unswitched 10 Mb network to a fully switched 100 Mb fiber network leveraging IRNE/INET. Enterprise systems have been upgraded and delivered via state of the art web delivery. More recently, Mr. Robinson has directed the development and delivery of a District data warehouse and dashboard solution providing access to key academic performance indicators for school building and central office administrators.

Mr. Robinson has also actively developed multi-agency collaboration through the development of the Metro Partnership, a multi agency enterprise that successfully manages Internet access at 80% less cost than original service provider. In addition, Mr. Robinson served as one of the founding members of the eSIS consortium for Oregon and has actively championed implementation of a single instance of a student information system which captures over 20 Districts serving a student population of over 135,000 students. This implementation cuts across operating agencies and Educational Service District boundaries to provide a truly cost effective and efficient delivery of student services.

Prior to joining Portland Public Schools, Mr. Robinson served 17 years in the private sector, serving in a variety of senior management positions within the utility industry. In his most recent position prior to joining PPS, Mr. Robinson served as Managing Director of Information Services Planning at PacifiCorp and as Vice President of Marketing and Customer Service for a subsidiary start-up of a broadband infrastructure and service company affiliated with a European multi-utility provider. The Company developed from business case to market ready within six months. On!Corp was positioned to deliver Internet access, telephony and cable TV services across a hybrid fiber-coax cable system to smaller markets in the Western US.

In addition to developing the start-up business, Mr. Robinson successfully lead the creation of a cultural transformation and the enhancement of the client service orientation of the IT department within PacifiCorp. Mr. Robinson had specific responsibility for implementation of transition planning for the Information Services Business, resulting from the Scottish Power/PacifiCorp merger as well as directed efforts to transform the IS culture to increase commercial awareness and improve business unit responsiveness to client needs.

Instructor, Department of Economics/School of Business

9/84 – 9/92, Portland State University, Portland, OR

Secondary Educator, Social Studies

9/79-6/83, Reynolds School District, Troutdale, OR

Education

M.S. Economics, Portland State University, 1984, graduated with honors.

B.S. Secondary Education (Social Sciences,) Oregon College of Education, 1980, graduated with honors.

Thomas H. Luba

(b)(6)

W: 514-812-2602

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PROFESSIONAL OBJECTIVE

To work in a leadership position in education and distance learning at a public/private school system, university or international organization.

SUMMARY OF QUALIFICATIONS

I have had progressively responsible positions in higher education, K-12 education, international development and training, and in the private sector. I have hands-on and supervisory experience with many major informational and educational media. I have led teams of writers, editors, graphic designers, instructors, media producers, instructional designers, and others on projects ranging from print to broadcast video to entire online graduate programs. I have built successful and profitable educational products and programs, specializing in the effective use of educational technology. I am a leader and a seasoned team player. I have particularly high standards of productivity and professional ethics, both for myself and for those whom I provide leadership. I am an avid problem-solver and I enjoy the process of working with others to find solutions. I find answers and I get results.

EDUCATION

1997

M.S. Educational Technology and Instructional Development
Purdue University School of Education, Lafayette, Indiana

1978

B.S. Forestry Resource and Recreation Management
Oregon State University College of Forestry, Corvallis, Oregon

EMPLOYMENT

9/2005 – present

Director, Learning Options

Linn Benton Lincoln Education Service District (LBL ESD)

Provide primary leadership for e-learning, homeschool, alternative education, and instructional support programs for the 3-county education service district. LBL ESD provides educational support programs and services to 12 component school districts, 87 schools and approximately 33,000 students in Linn, Benton and Lincoln counties and elsewhere in Oregon.

4/1998 – 8/2005

Director, Distance Learning

Portland State University, School of Extended Studies

Provide primary leadership for distance learning at Portland State University. Responsible for developing, directing and managing distance learning courses and academic programs, faculty training and support for developing and teaching distance learning courses, monitoring distance learning technology use and development, and supervising distance learning and information technology faculty and staff. Serve as University representative to statewide and national distance learning and information/education technology committees and planning groups. Directly supervise a staff of approximately 20 program specialists, distance site coordinators/monitors, classified employees, graduate teaching assistants and student employees. Supervise approximately 60 high school and college Independent Study course instructors. Supervise a varying number of instructors teaching graduate courses. Research and write grants. Manage self-support budgets totaling approximately \$1.5 million.

1993 - 1998

Coordinator, Distance Education and Information Technology

Purdue University, Agricultural Communications

Coordinated distance education and information technology programs and projects for the School of Agriculture and the School of Consumer and Family Sciences including satellite videoconferencing, interactive multimedia, networked educational computing and computer-based instruction. Produced and directed live, national satellite videoconferences and prerecorded video for use in distance education. Provided leadership to production teams including editors, graphic artists, videographers and associate/assistant producers. Managed statewide distance education digital and analog satellite networks. Developed and managed World Wide Web sites and provided advice and consulting to departments on instructional Web development, design, and use.

1991 - 1993

Educational Video, News and Videoconference**Producer/Director**

Purdue University, Agricultural Communications

Managed news, videoconference and educational video production including research, script writing, production and direction. Worked with faculty and staff to identify visual media educational needs and provided leadership to production teams including editors, graphic artists, videographers and associate/assistant producers.

1988 - 1991

Coordinator, Audiovisuals and Training Materials Development
*International Maize and Wheat Improvement Center (CIMMYT),
Information Services, Mexico*

Audiovisual design, writing and production. Training materials development. Publications writing and editing. Photo editing. Head of photography department. Computer user support to graphics department.

1986 - 1988

Owner/Producer/Director
Luba Productions, Portland, Oregon

Owned and operated successful, independent audiovisual production company specializing in video, multi-image, and slide-tape design and production. Client list included universities, local, state and federal agencies and private corporations.

1984 - 1986

Instructional Media Specialist
*International Maize and Wheat Improvement Center (CIMMYT),
Information Services, Mexico*

Audiovisual and instructional materials design, writing and production. Photo editing. Photography department head.

1980 - 1984

Instructional Media Specialist
Oregon State University, Forestry Media Center, Corvallis, Oregon
Audiovisual and printed materials design and production. Instructional materials development. Coordinator of College of Forestry Self Learning Center student facility.

PAPERS/PRESENTATIONS

2006

Association of Education Service Agencies (AESA)

21st Annual Conference

Experiences from Oregon: How ESAs Can Use Data to Support School Improvement

2006

Confederation of Oregon School Administrators (COSA)

32nd Annual COSA Seaside Conference, Seaside, OR

Choosing Tools and Implementing Processes for Data-Driven Decision Making

2005

Western Cooperative for Educational Telecommunications (WCET)
Annual Conference, San Francisco, CA
Bridging K-12 to Higher Education

2005

WebCT International Conference, San Francisco, CA
AP Online: Designing Courses for the Accelerated High School Learner

2004

Western Cooperative for Educational Telecommunications (WCET)
Annual Conference, San Antonio, TX
Distance Education Units: Why Are We Here?

2003

University Continuing Education Association (UCEA) Annual
Conference, Chicago, IL
*Hybrid Teaching, the Enhanced Lecture and Blended Learning: New
Approaches to Improve the Reach and Resonance of Adult Education
(co-presenter)*

2002

Western Cooperative for Educational Telecommunications (WCET)
Annual Conference, Denver, CO
Correspondence to Online: A Measured Approach

2002

Western Cooperative for Educational Telecommunications (WCET)
Annual Conference, Denver, CO
*Providing Personalized Student Services Online: A Look at the
Complexities (panel moderator)*

2002

WebCT International Conference, Vancouver, BC
*Successfully Redesigning a Distance MBA: The Portland State
University Experience*

2000

17th Annual Online Northwest Conference, Portland, OR
Library Services for Distance Education - What it Takes (co-presenter)

1998

World Aquaculture Society Meeting, Las Vegas, NV
*Formative and Summative Evaluation of Aquaculture Computer-Based
Instruction (co-presenter)*

1997

World Aquaculture Society Conference, Chicago, IL
Putting Multimedia to Work in Outreach Education (co-presenter)

1996

Agricultural Communicators in Education North Central Regional
Conference, Chicago, IL
HTML Authoring and World Wide Web Design

PUBLICATIONS AND CREATIVE PRODUCTS

Journal Articles, Books and Multimedia

Swann, D. LaDon, Katz, Sharon, Merzdorf, Russ, Brown, Jane, Luba, Tom and Talbert, B. Allen. 2000. *Computer-Based Instruction: Getting Started in Freshwater Aquaculture*. Journal of Extension , [On-line serial], 38(2). <http://www.joe.org/joe/2000april/tt2.html>

Swann, LaDon, Jane Brown, Sharon Katz, Tom Luba, and Russ Merzdorf. 1998. *Getting Started in Freshwater Aquaculture*. AS-524, IL-IN-SG-98-18 and ISBN 0-931682-71-1, 207 pp. (Book and CD-ROM)

Anthony Alpert

(b)(6)

EMPLOYMENT

Director of Assessment

OREGON DEPARTMENT OF EDUCATION

July 2005 – Current

SALEM, OR

Directs the Office of Assessment with a budget of approximately \$10 million per year. Develops policies, long and short term goals and objectives for Assessment Office relating to online and paper pencil based assessments including item writing, psychometrics, test design, test administration and reporting. Oversees production of reports of Adequate Yearly Progress (AYP) and Oregon's school and district performance reports. Evaluates programs, progress, time lines and risks for the office. Presents materials to State Board as required for policy decisions. Coordinates with agency partners, local, statewide and national organizations.

Manager of Assessment Scoring and Reporting

OREGON DEPARTMENT OF EDUCATION

March 2004 – July 2005

SALEM, OR

Managed the assessment scoring and reporting staff. Managed the production of individual student, school, district and state level reports based on results from online and paper and pencil assessments including reports of Adequate Yearly Progress (AYP) and Oregon's school and district performance reports. Developed, monitored and implemented budget and budget polices for Office of Assessment and Information Services.

Research Analyst 4

OREGON DEPARTMENT OF EDUCATION

February 2003 – March 2004

SALEM, OR

Primary responsibility for the management and allocation of the Oregon State School Fund budget and Allocations encompassing approximately \$3.7 billion per year. Worked with external partners to generate alternatives, build consensus, and resolve and implement solutions.

Research Analyst 4

OREGON DEPARTMENT OF EDUCATION

April 2000 – February 2002

SALEM, OR

Primary responsibility for the production of the School and District Performance Reports containing assessment, attendance, and dropout data as well as other indicators of school and district performance. Programmed the production application using Visual Basic, SQL and Postscript.

ADDITIONAL PROFESSIONAL EXPERIENCE

Research Analyst 3

OREGON DEPARTMENT OF CORRECTIONS

April 1998 – April 2000

SALEM, OR

Used descriptive and inferential statistics to analyze and report on corrections related data.

Senior Research Programmer

OREGON RESEARCH INSTITUTE

September 1995-April 1998

EUGENE, OR

Performed a wide range of statistical analyses utilizing conditional probabilities, general linear modeling and structural equation modeling.

Research Programmer

OREGON RESEARCH INSTITUTE

September 1993-September 1995

EUGENE, OR

Processed and organized data in preparation for analyses of three longitudinal studies of adolescent development.

Project Manager

STRATEGIC ADVANTAGE INC.

March 1992 to July 1993

MINNEAPOLIS, MN

Managed a staff that oversaw the implementation and operation of twelve mental health outcome studies.

EDUCATION

	B.A. UNIVERSITY OF MINNESOTA Summa Cum Laude	1989-1993 MINNEAPOLIS, MN
<i>Major:</i>	Psychology and Sociology	
<i>Award:</i>	Received monetary award from the Undergraduate research Opportunities Project to conduct experiment for honors thesis	
	M.S. UNIVERSITY OF OREGON	1994-1996 EUGENE, OR
<i>Major:</i>	Psychology, Sociology, Decision Sciences	
	Graduate Certificate in Large Scale Assessment UNIVERSITY OF MARYLAND	2005 COLLEGE PARK, MD

PUBLICATIONS

- Duncan, S.C., Alpert, A., Duncan, T.E., & Hops, H. (1997). Adolescent alcohol use development and young adult outcomes. Drug and Alcohol Dependence, 49, p.39-48.
- Duncan, T.E., Alpert, A., Duncan, S.C., & Hops, H. (1996). Multilevel covariance structure analysis of sibling substance use and intra-family conflict. Journal of Psychopathology and Behavioral Assessment, 18(4), p.347-369.
- Duncan, T.E., Duncan, S.C., Alpert, A., Hops, H., Stoolmiller, M., & Muthen, B. (1997). Latent variable modeling of longitudinal and multilevel substance use data. Multivariate Behavioral Research, 32(3), p.275-318
- Duncan, T.E., Duncan, S. C., Alpert, A., & Hops, H. (1997). Multilevel covariance structure analysis of intra-familial substance use. Drug and Alcohol Dependence 46, 167-180
- Duncan, T.E., Alpert, A., & Duncan, S.C. (1998). Multilevel covariance structure analysis of sibling antisocial behavior. Structural equation modeling 5(3), 211-228
- Duncan, T.E., Duncan, S. C., Alpert, A. (1997). Multilevel covariance structure analysis of family substance use across samples and ethnicities. Journal of Gender, Culture, and Health, 2(4), p271-286.
- Duncan, T.E., Duncan, S.C., Strycker, L.A., Li, F., & Alpert, A., (1999). An Introduction to Latent Variable Growth Curve Modeling: Concepts, Issues, and Applications. Mahwah NJ: Lawrence Erlbaum Associates.
- Hops, H., Alpert, A., & Davis, B. (1997). The development of same and opposite-sex social relations among adolescents: An analogue study. Social Development, 6(2), 165-183.
- Hupp, S, Brown, M., Alpert A. (1992). Impact of adult interaction on play behaviors and emotional responses of preschoolers with developmental delays. Education and Training in Mental Retardation, p.145-152
- Sheeber, L., Hops, H., Alpert, A., Davis, B., Andrews, J. (1997). Family support and conflict: Prospective relations to adolescent depression. Journal of Abnormal Child Psychology, 25(4), p. 333-344.
- Sheeber, L., Hops, H., Andrews, J.A., Alpert, A., & Davis, B. (1998). Interactional processes in families with depressed and nondepressed adolescents: Reinforcement of depressive behavior. Journal of Abnormal Psychology.

Vickie Fleming

(b)(6)

Candidate for
Superintendent – Redmond SD

Career Objective:
To provide excellent executive leadership
in a progressive educational environment

EDUCATION:

Master of Science, Speech-Language Pathology
Western Oregon University, 1977
Bachelor of Science, Education
Western Oregon University, 1976
Educational Administration
Portland State University, 1987 to 1998

CERTIFICATION:

Oregon Standard License, Speech Impaired
Certificate of Clinical Competence,
American Speech & Hearing Association
Standard Administrative Endorsement

PROFESSIONAL EXPERIENCE:

Deputy Superintendent, Oregon Department of Education, July 2005 to present

- Manage all operations and budget of the state department, supervise management team
- Act as liaison to the Governor, Oregon Legislature and key education stakeholders
- Advise the Superintendent of Public Instruction on educational policy and programs
- Advise the State Board of Education on educational policy, fiscal and operational issues

Assistant Superintendent of Instructional Services, Oregon Department of Education, January 2003 to June 2005

- Supervise assoc. superintendents and all federal and state programs in four offices of ODE
- Advise Deputy Superintendent of Operations
- Act as liaison to Governor, Oregon Legislature and key education stakeholders

Assoc. Superintendent, Professional Technical Education, Oregon Department of Education, July 2002 to Dec. 2002

- Oversee state and federal programs and grants for professional technical education in high schools and community colleges
- Advise on high school reform and implementation of the Certificate of Advanced Mastery
- Act as liaison to the USDOE and key education stakeholders
- Advise the Superintendent of Public Instruction and State Board of Education on PTE

Director, Mid-Willamette Education Consortium, Chemeketa Community College, September 1999 to July 2002

- Provided regional support for implementation of the Certificate of Advanced Mastery and high school reform
- Regional Coordinator, Professional Technical Education - Marion, Polk and Yamhill counties
- Managed Workforce Investment Act Youth Opportunity System - Region 3
- Managed College Credit Now! -dual credit articulation with local high school.
- Coordinated regional business partnership through Regional Chamber Education Alliance
- Advocated for local, regional and state-level policies to connect education and youth workforce policy
- Provided technical assistance and professional development for continuous program improvement
- Managed federal grants including Perkins, Workforce Investment Act and STWOA
- Supervised MWEC team and managed regional strategic plan

*Assistant Superintendent for Community Resources, Administrator, Youth Corrections Education Program
Willamette Education Service District, 1997 to August 1999*

- Managed educational programs at MacLaren and Hillcrest Youth Correction Facilities.

- *Managed and supervised staff for Western Willamette Professional Technical Consortium*
- *Managed and supervised Teen Parent Outreach staff in Marion and Polk Counties*
- *Developed opportunities for school districts to participate in school to career activities through grant writing, partnership development and liaison activities*
- *Provided organizational development training and support as requested for school building staff, school boards and teachers*
- *Supported development of Certificate of Advanced Mastery programs in school districts in Marion and Polk Counties*
- *Developed resources for school district projects including school to work, social service integration, community partnerships and other supportive activities*
- *Acted as liaison to policy groups including the Enterprise for Education and Employment, MWEC and others*

Director of Special Programs

Willamette Education Service District / Polk ESD (prior to annexation), 1988-1989 & 1991-1997

- *Managed programs including School to Careers Project, speech-language pathology, school psychology, Polk Teen Parent Project and Early Intervention/Early Childhood Special Education*
- *Managed consortium grants: provide fiscal monitoring of contracts to support including Carl Perkins, JTPA, Safe and Drug-Free Schools/Communities Act, Special Education (IDEA), Polk Commission on Children & Families, Child Care Development Block Grant*
- *Provided oversight of interagency programs and agreements for Polk Teen Parent Project, school health nurse and school-based mental health counselor with Polk County Human Services*
- *Provided direct supervision of special programs staff, facilitate program and staff development through evaluation/supervision*
- *Acted as liaison to regional policy groups including Mid-Willamette Education Consortium, WOU Professional Development Advisory Committee, School to Work Council, Healthy Start Policy Board, etc.*

Regional Coordinator/Great Start Program Manager, Governor's Children's Agenda

Oregon Community Children and Youth Services Commission, 1989-1991

- *Implemented Great Start program, a discretionary early childhood grant for each county in Oregon as defined by HB 3466 (1989 Legislature)*
- *Provided technical assistance to county Children and Youth Services Commissions to develop advocacy efforts for children*
- *Assisted in development of early childhood legislation (HB 3565) for 1991 legislative session.*
- *Facilitated community action planning efforts*
- *Participated in interagency planning to build state plan for Child Care and Development Block Grant.*

Supervisor, Speech Services, Polk ESD, 1984-1988

- *Provided direct supervision of speech-language staff in public school setting*
- *Initiated Communication Development Classroom, an alternative preschool for 3-5 year old speech-language delayed children*

Speech/Language Pathologist, Polk ESD, 1977-1984

- *Provided direct service to students preschool to grade 12*
- *Originated a classroom program (based on Orff-Schulwerk) to promote language development for preschool children*

OTHER PROFESSIONAL AFFILIATIONS AND HONORS

- *Leadership Salem, Salem Chamber of Commerce, Class of 2003*
- *Association for Curriculum and Supervision Development, present*
- *Governor's Award for Community Involvement in Oregon Children's Agenda, July 1989*
- *Student Retention Initiative Award for Community Collaboration, March 1988*

ELAINE YANDLE-ROTH

Department of Community Colleges and Workforce Development

255 Capitol Street, NE

Salem, Oregon 97310

(Phone 503-378-8648 or Cell (b)(6))

EDUCATION:

POST GRADUATE: Oregon State University, Oregon Division of Continuing Education and Portland State University: Part Time 1971-1978

MASTER OF SCIENCE: Park and Recreation Administration, University of Illinois, Urbana, Illinois, 1970-1971

BACHELOR OF SCIENCE: Home Economics Education (Vocational Certification), Oregon State University, Corvallis, Oregon, 1966-1970

WORK EXPERIENCE:

EDUCATION SPECIALIST 2: Department of Community Colleges and Workforce Development and the Oregon Department of Education, Salem, Oregon 1984-present.

Working titles during the past two plus decades have included Community College Instruction Specialist, Education Reform Team Leader, Instructional Programs Unit Leader and Community College Instruction and Community Education Specialist. Agency titles have included Oregon Department of Education, Office of Community College Services and Department of Community Colleges and Workforce Development.

I have served on grant advisory and management teams (inter-sector data, FIPSE and Eisenhower grants); lead the community college FTE Audit process (data & policy interpretation); co-staffed the FTE Guidelines Advisory Committee (policy development); acted as technical expert on articulation/transfer; led inter-sector education policy development and implementation, including development and maintenance of the Associate of Arts-Oregon Transfer (AAOT) and Associate of Science-Business degrees and the Oregon Transfer Module; staffed and served as a member of the Joint Boards Articulation Commission (a group reporting to the Oregon Boards of Education and Higher Education); served on the Oregon Career Information System Board; participated on numerous K-20 improvement teams; lead or served on inter-education sector teams to organize a decade of conferences focused on Articulation, Transfer, Student Success and Retention; reviewed courses and curricula for compliance with State standards; provided technical assistance and training on a wide variety of community college-related topics; and developed, monitored and interpreted state legislation and administrative rules.

As Community College Instruction and Community Education Specialist for the Oregon Department of Education, I directed the Oregon Community Education Development Center; provided technical assistance, communication and training in community education, community college instruction, school-business partnerships, volunteer management, community relations

and related topics. I developed, managed, and evaluated grants; staffed the development of the AAOT and statewide course listing for transfer and for state funding; and worked with advisory and professional groups.

DIRECTOR OF PARKS AND RECREATION: City of Gladstone, Oregon September 1983 – October 1984.

My duties included administration of a comprehensive recreation program, a senior center and local and regional parks. I served on the contract negotiation team, developed and managed budgets, a citizen advisory committee and recreation and park department staff.

PROJECT COORDINATOR: Oregon Community Education Association, Eugene, Oregon, January-December 1982.

In this position I led the planning and organization of two interagency state-wide conferences, wrote or edited and produced twelve “How To” publications, monitored project funds, and conducted presentations on community education and interagency cooperation.

SALE ASSOCIATE: MBA Properties Bruinsma and Associates, Lake Oswego, Oregon, August 1979 – February 1982.

As an independent contractor, I handled all aspects of residential real estate marketing.

COMMUNITY SCHOOL COORDINATOR: West Linn Public Schools, West Linn, Oregon, September 1980 – June 1981.

The organization of community resources in the classroom for students in grades three through eight, organization and monitoring of adult classes, and assisting with class registration were my primary duties.

DIRECTOR OF PARKS AND RECREATION: City of West Linn, Oregon, September 1978 – August 1979.

My duties included preparing and administering park and recreation department budgets, grant writing, public presentations, facilitation of a citizen advisory board and community volunteer groups, organization of recreation programs, and supervision of recreation and park staff.

INSTRUCTOR RECREATION RESOURCE MANAGEMENT, Oregon State University, September 1977 – June 1978; INSTRUCTOR RECREATION AND PARK MANAGEMENT, University of Oregon, September 1975 – June 1977; and LECTURER RECREATION AND LEISURE STUDIES, San Jose State University, August 1974 – June 1975.

In the three positions listed above, I handled student recruitment and admission, career counseling, supervised the internship and field study programs, advised a student section of the state professional association, served on university-wide committees, and performed other academic functions. Courses taught included Administration of Leisure Services, Programming, Leadership, Philosophy of Leisure, Introduction to Therapeutic Recreation, Foundations of Recreation management, and Marine Recreation.

COMMUNITY RESOURCES COORDINATOR: *Hood River County Schools, Hood River, Oregon, January 1973 – July 1974.*

I developed the community education program, which included recreation programs of all ages, adult education including non-credit, high school credit and high school completion, community college and university curriculum development, staff recruitment and selection, promotion and evaluation. I also served on the district-wide curriculum committee and assisted with resources in the regular classroom program,

RECREATION PROGRAMS COORDINATOR and AQUATIC DIRECTOR AND INSTRUCTOR: *City of Lake Oswego, Oregon, July 1971 – January 1973 and summers 1967 – 1970.*

I began my five and one-half years with the Parks and Recreation department as an Aquatics Instructor and lifeguard and was promoted to Director of the Swim Park and aquatic classes. After completion of my education, I took over as coordinator of the general recreation programs. This position included extensive grant writing, staff recruitment, processing of all park and recreation department financial records, and purchasing.

Project Narrative

Other Narrative

Attachment 1:

Title: Pages: Uploaded File: **8407-Mandatory_FINAL_Timeline.doc**

Attachment 2:

Title: Pages: Uploaded File: **3887-FINAL_AppendixB.doc**

Oregon Department of Education
Oregon DATA Project: Direct Access to Achievement

Appendix A—Timeline

The Oregon DATA Project: Direct Access to Achievement

Appendix A—Timeline

TASK	RESPONSIBLE PERSON	START DATE	END DATE	EVALUATION
Phase 1: EXPLORATION				
Bimonthly meetings with EESC Work Group	EESC Work Group	November 2007	November 2008	Help develop key stakeholder survey; needs assessment; analyze, summarize, & report on data. Develop processes for measuring EESC Work Group effectiveness.
Training: “Data-driven decision-making 101”	Instructional Leadership Cadre Mickey/Garrison	November 2007	November 2008	Develop workshop evaluation instruments; collect and analyze data.
Develop assessment measure for districts to use to gather current data sources	EESC Work Group	November 2007	January 2008	Help develop assessment measures.
Deploy assessment	ESDs	January 2008	March 2008	
Validate data	ELC curriculum directors	April 2008	May 2008	Analyze, summarize, & report on data
Aggregate validated data	EESC Project directors Golden/Garrison	November 2007	May 2008	Review process

Examine state-level data from KIDS	EESC Work Group KIDS Project director	November 2007	November 2008
Collaborate with other states on K-12 data transfer procedures	EESC Work Group Reps from collaborating states	December 2007	May 2008

Help review and analyze transfer effectiveness.

Phase II: DESIGNING DATA STRUCTURE

Bimonthly meetings with expanded work group to include EESC, KIDS team and other stakeholders	EESC Work Group	December 2008	Review and expand Phase I processes to meet evaluation requirements for Phase II.
Training: "DD3 202"	Instructional Leadership Cadre Mickey Garrison	November 2007	Develop workshop evaluation instruments; collect and analyze data.
Expand KIDS dictionary, and create business rules and quality assurance procedures for regional warehouses	EESC work group	May 2008	Evaluate process implementation and results.
Methods for collecting data reviewed for gaps, timeliness	EESC work group	May 2008	Work with EESC in developing an effective methodology.
Create assessment procedure for regional warehouse operations	EESC work group	May 2008	Work with EESC in developing an effective methodology.

Business intelligence tools evaluated as per state pilot; RFP issued	EESC work group	August 2008	September 2008	Review and monitor process.
Vendor chosen	EESC work group	October 2008	October 2008	
Data contract specifications to complete Phase 2; publish RFP	EESC Project directors Golden/Garrison	October 2008	November 2008	Provide input on evaluation criteria.
Contractor chosen and begins work on the integrated Oregon DATA system	Contractor	January 2009	January 2009	
Contractor travels to regional warehouses as needed	Contractor	January 2009	December 2009	

PHASE 3: PILOTING AND IMPLEMENTATION

Training: "DD3 303" Hands-on phase	Instructional Leadership Cadre Mickey Garrison	January 2010	December 2010	Develop workshop evaluation instruments; collect and analyze data.
Expansion of regional warehouses begins	EESC work group Contractor OAESD	June 2009	December 2010	
Construction begins for new warehouses to cover gaps in state	Established regional data warehouses (name)	August 2009	March 2010	

Launch pilot of DATA project within established regional data warehouses	Established regional data warehouses (name)	August 2009	March 2010	Develop instruments and processes to measure pilot effectiveness. Help collect, evaluate, and analyze data; summarize results and develop recommendations.
Modifications made from evaluation findings	Established regional data warehouses Work group	March 2010	May 2010	
Target regions within state with greatest need	Established regional data warehouses Work group	July 2010	July 2010	Develop instruments and processes to measure roll-out and plan for its implementation.
Implement full roll-out, with needy districts first	Established regional data warehouses Work group	September 2010		

Oregon Department of Education
Oregon DATA Project: Direct Access to Achievement

Appendix B—Optional Attachments

SUSAN CASTILLO
State Superintendent of Public Instruction



OREGON DEPARTMENT OF EDUCATION
Public Service Building, 255 Capitol Street NE, Salem, Oregon 97310
Phone (503) 947-5600 • Fax (503) 378-3126 • www.ode.state.or.us

March 13, 2007

Kashka Kubzdela
U.S. Department of Education
National Center for Education Statistics
1990 K Street, NW., Room 9014
Washington, DC 20006-5651

Dear Kashka Kubzdela:

I am writing in support of Oregon's application for an Institute of Educational Science grant to continue and expand their enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward beyond what our state funds will allow at this time.

Working in close collaboration, Oregon Department of Education, Education Service Districts, school districts, higher education, and community colleges are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum.

Based on input from across the enterprise, the highest priority for Oregon educators is having better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. The Work Group comprises statewide, cross-sector stakeholders, bringing full commitment and expertise to this effort.

I am confident that the Work Group, which is supported by the Governor, legislators, the Oregon Department of Education, and K20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirement.

Sincerely,

A handwritten signature in black ink, appearing to read "Susan Castillo".

Susan Castillo
Superintendent of Public Instruction



COMMUNITY
COLLEGES AND
WORKFORCE
DEVELOPMENT
WORKFORCE OREGON

Public Service Building

235 Capital Street NE

Salem, Oregon 97310

Phone: (503) 271-2646

Fax: (503) 978-3169

www.ode.state.or.us

March 1, 2007

Dear Sir/Madam:

I am writing in support of Oregon's application for an Institute of Education Sciences (IES) grant to expand Oregon's education enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward more quickly than our state funds will allow at this time.

The grant application addresses a key policy objective for the State Boards of Education and the Joint Boards of Education, development of aligned systems that promote smooth and successful student transitions from pre-kindergarten (Pre-K or P) to postsecondary education and training and the workforce. To that end, Oregon Department of Education, Education Service Districts, school districts, higher education, and community colleges are working in close collaboration developing this phase of a statewide, longitudinal data system that will improve collection and transmission of student data which can be used across the K-20 continuum.

The highest priority for Oregon educators is to have better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. This Work Group comprised of statewide, cross-sector stakeholders, developed this proposal and bring their full commitment and expertise to effort. I am confident that the Work Group, which is supported by the Governor, legislators, ODE, and K20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirement.

Sincerely,

Cam Preus-Brady
Commissioner





CONFEDERATION OF OREGON SCHOOL ADMINISTRATORS

707 13th STREET SE SUITE 100, SALEM, OREGON 97301
TELEPHONE (503) 581-3141
FAX (503) 581-9840

February 27, 2007

Dear Sir/Madam:

I am writing in support of Oregon's application for an IES grant to continue and expand its enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward beyond what our state funds will allow at this time.

Working in close collaboration, Oregon Department of Education, education service districts, school districts, higher education and community colleges are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum. This system will provide districts, schools, administrators and teachers the data they need to make the best possible decisions and plans for continuing to improve student achievement and school performance. It is an extremely high priority for COSA, whose membership is comprised of Oregon's educational leaders.

Based on input from across the enterprise, the highest priority for Oregon educators is having better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. The Work Group comprises statewide, cross-sector stakeholders, bringing full commitment and expertise to this effort.

I am confident that the Work Group, which is supported by the Governor, legislators, ODE, and K-20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirements.

Sincerely,

A handwritten signature in cursive script that reads "Kent Hunsaker".

Kent Hunsaker
Executive Director

United States Senate
WASHINGTON, DC 20510

March 5, 2006

Superintendent Susan Castillo
255 Capitol St. NE
Salem, OR 97310

Re: Longitudinal Data System Grant: CFDA # 84.372

Dear Superintendent Castillo:

We are writing in support of Oregon's application for *Longitudinal Data System Grant* matching funds, which will further strengthen the Oregon education system and ensure that every student in the state has the opportunity to get good education, which provides them with the knowledge and skills necessary to realize their potential.

We applaud your recognition of the fact that closing the achievement gap requires better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. We also applaud the steps taken to date in the state to foster the development of these skills and this training, including the creation of the Data Quality Work Group, which is supported by the Governor, legislators, the Oregon Department of Education, and key K-12 personnel across the state.

We understand that the Work Group is currently developing the next phase of a statewide longitudinal data system. We are confident that the result will be a thorough, viable plan meeting the needs of all Oregon students, building capacity to exchange student data across institutions, and seamlessly aligning systems to respond to federal reporting requirements.

We fully support the Work Group's efforts and the Oregon Department of Education's grant application to secure matching funds to help finance this effort.

Sincerely,



Senator Ron Wyden



Senator Gordon Smith

Ma
rch
1,
200
7

**North Central
Service District**

Education

Dear Sir or Madam:

I am writing in support of Oregon's application for an IES grant to continue and expand their enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward beyond what our state funds will allow at this time.

Working in close collaboration, the Oregon Department of Education, Education Service Districts, school districts, higher education, and community colleges are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum.

Based on input from across the enterprise, the highest priority for Oregon educators is having better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. The Work Group comprises statewide, cross-sector stakeholders, bringing full commitment and expertise to this effort.

I am confident that the Work Group, which is supported by the Governor, legislators, ODE, and K20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirement.

Sincerely yours,



Rinda Montgomery Conwell
Director of School Improvement

Rinda Montgomery Conwell, Director of School Improvement
North Central Education Service District
PO Box 637, 135 S. Main Street
Condon, OR 97823



OREGON ASSOCIATION OF EDUCATIONAL SERVICE DISTRICTS

I am writing in support of Oregon's application for an IES grant to continue and expand their enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward beyond what our state funds will allow at this time.

Working in close collaboration, Oregon Department of Education, Education Service Districts, school districts, higher education, and community colleges are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum.

Based on input from across the enterprise, the highest priority for Oregon educators is having better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. The Work Group comprises statewide, cross-sector stakeholders, bringing full commitment and expertise to this effort.

I am confident that the Work Group, which is supported by the Governor, legislators, ODE, and K20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirement.

Sincerely,

Dennis Dempsey
President
OAESD
Superintendent
High Desert ESD
Redmond, Oregon



March 5, 2007

Dear Sir/Madam:

I am writing in support of Oregon's application for an IES grant to continue and expand their enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward beyond what our state funds will allow at this time.

Working in close collaboration, Oregon Department of Education, Education Service Districts, school districts, higher education, and community colleges are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum.

Based on input from across the enterprise, the highest priority for Oregon educators is having better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. The Work Group comprises statewide, cross-sector stakeholders, bringing full commitment and expertise to this effort.

I am confident that the Work Group, which is supported by the Governor, legislators, ODE, and K20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirement.

Sincerely,

A handwritten signature in black ink, appearing to read 'Duncan Wyse', is written over a horizontal line.

Duncan Wyse
President, Oregon Business Council
Vice Chair, Oregon State Board of Education

1100 SW 6th Avenue Standard Plaza, Suite 1608 Portland, Oregon 97204-1090

tel: 503-220-0691 fax: 503-228-9767 orbusinesscouncil.org



March 8, 2007

Dr. Kashika Khabzela
U.S. Department of Education
National Center for Education Statistics
1990 K Street, NW., Room 9014
Washington, DC 20006-5651

Dear Dr. Khabzela:

I am writing in support of the application by the Oregon Department of Education for an IES grant to continue and expand their enterprise-wide longitudinal data system. The Oregon School Boards Association believes it is critical that Oregon have matching funds to help move us forward beyond what our state funds will allow at this time.

Working in close collaboration, Oregon Department of Education, Education Service Districts, school districts, higher education, and community colleges are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum.

Based on input from across the enterprise, the highest priority for Oregon educators is having better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. The Work Group comprises statewide, cross-sector stakeholders, bringing full commitment and expertise to this effort.

I am confident that the Work Group, which is supported by the Governor, legislators, ODE, and K20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirements.

Sincerely,

Kevin McCann
Executive Director

MEMBERS

- President
Jeff Sanchez
Jefferson County
- President-Elect
Craig Priddy
Phonix School
- Vice President
Annette Malton
David Douglas
- Secretary/Treasurer
Beth Goyl
Bugsby
- Past President
David Benson
Silver Falls

MEMBERS

- Henry Khabzela
Beverly Hills ESD
- Maria Calabrese
Gresham
- Francis Chantawee
McMinnville
- Wally Hagen
Coos Bay
- Kim Hinesell
Crescent-Eliades
- Dave Krummen
Pawnee
- Krista Lamora
Salem-Kern
- Dawn Livy/Strickland
Crown Applegate-Lasara
- Fred Mearns
Forest Grove
- Scott Poir
High Desert ESD
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State Board of Education
Jerry Bergin

EXECUTIVE DIRECTOR

- Kevin McCann



SUSAN CASTILLO
State Superintendent
of Public Instruction

CAMPREUS BRALY
Commissioner of
Community Colleges
& Workforce
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ROGER WILL

OREGON STATE BOARD OF EDUCATION

255 Capitol St. NE, Salem, Oregon 97310-1300
503-947-5746, www.ode.state.or.us TDD: 503-378-2892

March 6, 2007

Dear Sir or Madam:

I am writing in support of Oregon's application for an Institute of Education Sciences grant to continue and expand their enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward beyond what our state funds will allow at this time.

Working in close collaboration, Oregon Department of Education (ODE), Education Service Districts, school districts, higher education, and community colleges are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum.

Based on input from across the enterprise, the highest priority for Oregon educators is having better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. The work group comprises statewide, cross-sector stakeholders, bringing full commitment and expertise to this effort.

I am confident that the work group, which is supported by the Governor, Legislators, ODE, and K-20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirement.

Sincerely,

Jerry Berger, Chair
State Board of Education



Oregon
University
System

March 8, 2007

Dr. Kashka Kubzdela
U.S. Department of Education
National Center for Education Statistics
1990 K Street, NW., Room 9014
Washington, DC 20006-5651

Office of the Chancellor
P.O. Box 3175
Eugene, OR 97403-0175
PHONE: (541) 346-5720
FAX: (541) 346-5764
<http://www.ous.edu>

Dear Dr. Kubzdela:

I am writing in support of Oregon's application for an Institute of Education Sciences grant to continue to expand its enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward.

Working in close collaboration, the Oregon Department of Education, Education Service Districts, school districts, the Oregon University System, and community colleges are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum. The Oregon University System has been, and continues to be, an active partner in the development and coordination of these systems.

From a university perspective, having students enter college well prepared for post-secondary education is critical to Oregon's goals for a better educated citizenry and workforce. Key elements for improving student preparation are the ability to track student performance across the educational continuum, and to provide information to allow educators at all segments of public education in the state to make informed, data-informed decisions about improving programs, aligning curriculum, and improving instruction for students. Funding this grant will help Oregon move forward in providing the tools and training needed for educators in K-12 to use data more effectively to support student success at all levels.

OUS is an active partner in the Data Quality Work Group comprised of statewide, cross-sector stakeholders, supported by the Governor, legislators, ODE, and K-20 key personnel across the state. I am confident that the Group will execute an effective plan for meeting the needs of Oregon's students, while aligning its system to respond to federal reporting requirements.

Thank you for the opportunity to write on behalf of this application. I urge you to review this grant application favorably.

Sincerely,

A handwritten signature in black ink, appearing to read 'George Pernsteiner', written over a horizontal line.

George Pernsteiner
Chancellor



February 28, 2007

Dear Sir/Madam:

On behalf of the Oregon Education Association (OEA), please accept this letter of support for Oregon's application for an IES grant to continue and expand their enterprise-wide longitudinal data system. It is critical that Oregon have matching funds to help move us forward beyond what our state funds will allow at this time. Working in close collaboration, the Oregon Department of Education, Education Service Districts, school districts, higher education, and community colleges, as well as other stakeholder groups such as OEA, are developing the next phase of a statewide, longitudinal data system that will improve collection and transmission of student data across the K-20 continuum.

Based on input from across the enterprise, a high priority for Oregon educators is having better tools and training to collect, analyze, and apply quality, formative data to individual student instruction. Based on this unanimous concern, the Data Quality Work Group has formed to develop and deploy comprehensive programming to meet this and related critical needs. The Work Group comprises statewide, cross-sector stakeholders, bringing full commitment and expertise to this effort.

I am confident that the Work Group, which is supported by the Governor, legislators, ODE, and K20 key personnel across the state, will render a thorough, viable model and plan for meeting the needs of Oregon's students, while seamlessly aligning its system to respond to federal reporting requirements.

Thank you.

Courtney Vanderstek
Assistant Executive Director
Oregon Education Association

Budget Narrative

Budget Narrative

Attachment 1:

Title: Pages: Uploaded File: **7263-Mandatory_BUDGET_NARRATIVE.doc**

Three-Year Budget Narrative
Oregon Longitudinal Data System

	Year 1	Y1 In-kind	Year 2	Y2 In-kind	Year 3	Y3 In-kind	Total In-kind	Total Request
Personnel – Salaries and Benefits (with 3% annual cost-of-living-adjustment) – Oregon's approach to this project proposal will be to leverage resources from four separate initiatives scheduled to receive funding in 2007-09. These projects are described in the Project Narrative. These projects are KIDS Phase III, Longitudinal Growth, Assessment Literacy and Cross Office Data Management and will be referred to as ODE Initiative Staff. The time allotted to the longitudinal data systems is represented by a percentage that will be applied to the work described in this proposal within the "In-kind" column. The FTE which are listed under each year are actual salary and benefit costs which will be covered by the grant. All percentages below represent time and salary.								
Project Sponsor – (Doug Kosty)		(b)(4)		(b)(4)			(b)(4)	
Project Manager – (Baron Rodriguez)								
Project Technical Lead – (Leslie Golden)	100,000		100,000		100,000			300,000
Project Functional Lead – (Mickey Garrison)	100,000		100,000		100,000			300,000
1 - Communications Coordinator – (tbd)	100,000		100,000		100,000			300,000
.5 - ODE Initiative Business Analyst – (tbd)								
.5 - ODE Initiative Research Analysts (tbd)								
	300,000		300,000		300,000			900,000
Travel - Due to the geographic size and diversity of Oregon, our approach to this project will leverage resources from our regional partners known as Education Service Districts (ESD). The prices listed below allow for travel between these regional hubs and the schools and districts within their region. It is anticipated that staff from 3 ESDs will not require overnight lodging, but staff from 2 will. Costs below reflect this assumption.								
4 trips per year to 5 ESDs to gather requirements, coordinate projects, train staff.	9,770		9,770		9,770			29,310
Travel based on:								
o 2 vehicles @ 200miles per trip x .48 x 4 = \$770								
o 20 nights lodging for \$80/night for 5 staff = \$8000								
o Meals for 5 staff @ \$50/dayx4 = \$1000								
Project Manager and 2 Project Leads travel to conference in DC:	4,800		4,800		4,800			14,400

<ul style="list-style-type: none"> o Airfare - \$1,000/person x 3 o Lodging - \$180/night x 3 x 3 o Meals and Perdiem for 3 - \$60/night 																			
Equipment - Equipment to be used for this project will be provided by ODE Initiatives and ESD Regional Warehouses																			
Contractual costs - Due to the size and regional diversity of Oregon, our approach to this project will leverage resources from our regional partners known as Education Service Districts (ESD). Five ESD partners will be selected by ODE through a competitive process and will be responsible for gathering requirements and determining needs of customers, developing professional development content and documentation, delivering training on improving data driven decision-making, and providing analytical services for all school and district personnel throughout Oregon. The following FTE will be provided through these contracts. Oregon ESDs will have the ability to sustain these staff through an existing funding model known as resolution services.																			
1. Personnel																			
5 - ESD Project Managers (3)	150,000	154,500	159,135	463,635															
1 - Professional Development Coordinators (3)	100,000	103,000	112,090	315,090															
5 - Regional Trainers (3)	400,000	412,000	424,360	1,236,360															
5 - Regional IT Coordinators (3)	100,000	103,000	106,090	309,090															
2 - Online Instructional Designers (2) (each)	200,000	206,000	212,180	618,180															
5 - ESD Clerical Support (3)	50,000	51,500	53,045	154,545															
				375,000															
2. Fringe Benefits																			
Included in salaries listed above																			
3. Travel																			
Project Manager:	1,630	1,630	1,630	4,890															
<input type="checkbox"/> Travel to centralized location for planning and coordination meetings and events.																			
Professional Development Coordinator:	1,630	1,630	1,630	4,890															
<input type="checkbox"/> Travel to centralized location for planning and coordination meetings																			

Comment [IL1]: Can this be part of the match?

Comment [IL2]: and what??

salary plus benefits for these position is \$412,000, reflecting a 3% increase. The year three salary plus benefits for these positions is 424,360, reflecting a 3% salary increase.

Regional IT Coordinators

The ESD regional IT Coordinators are part-time positions. These ESD based individuals will be responsible for managing the technical aspects of the regional warehouses in collaboration with the State office. The total project request for these position is \$309,090. The salary plus benefits request for these positions in year one is \$100,00. The year two salary plus benefits for these position is \$103,000, reflecting a 3% increase. The year three salary plus benefits for these position is 106,090, reflecting a 3% salary increase.

Online Instructional Designers

The ESD Online Instructional designers are full-time positions. These regionally based individuals will be responsible for working with the Trainers and with other key project staff to identify, plan and develop online professional development assets for teachers, administrators and other stakeholders.. The total project request for these position is \$618,180. The salary plus benefits request for these positions in year one is \$200,00. The year two salary plus benefits for these position is \$206,000, reflecting a 3% increase. The year three salary plus benefits for these position is 212,180, reflecting a 3% salary increase.

ESD Clerical Support

The ESD Clerical Support are part-time position. These ESD based individuals will be responsible for supporting project staff located at the regional ESDs. The total project request for these positions is \$154,545. The salary plus benefits request for these positions in year one is \$50,000. The year two salary plus benefits for these position is \$51,500, reflecting a 3% increase. The year three salary plus benefits for these positions is 53,045, reflecting a 3% salary increase.

2. Fringe Benefits

Calculated as follows:

OPSRP	12.19%
OPERS	16.97%
FICA	7.65%

Workers Comp	0.3220%
Annual to \$50K/1,000 X	
Acc Death	.03
Annual to \$50K/1,000 X	
Life	.10
LTDisability	Monthly X .0058

3. Travel

Various staff members will be required to travel throughout the state and the regions for meetings, survey and research work and for conducting training. Onsite training and planning meetings will constitute the majority of this cost. Travel is calculated using standard state and federal allowances and per-diems. Those include \$39.00 per day per-diem, \$.48 per mile of travel, and \$100/day for lodging. There will likely not be any need for air travel for ESD staff.

4. Equipment

Server Hardware:

New servers will be purchased and placed at regional locations that currently do not have the equipment capable of hosting a regional data warehouse.

Server Software:

New server software will need to be purchased to be placed on the new servers hosting data warehouses.

Computers:

The ESDs will purchase a desktop computer for each of the new staff hired under this project. In addition the department will purchase a laptop computer for each of the trainers. The total request for these items in year one is \$12,500 (\$1000/desk top computer x 5 computers) + (\$1,500/laptop computer x 5 computer).

Video projectors:

A video projector will be purchased for each of the regional trainers (5) for the purposes of preparing and delivering onsite training presentations.

5. Supplies

Office supplies:
The ESDs will purchase office supplies, such as paper, pencils, desks, chairs, and printer ink. The total project cost for office supplies is \$15,000. The request in year one is \$5,000, in year two is \$5,000, and in year three is \$5,000.

Promotional materials:
The ESDs will purchase materials and print documents to promote the project. The total project cost for these items is \$12,000. The request for these items in year one is \$2,000, in year two is \$5,000, and in year 3 is \$5,000.

Training materials:
The ESDs will purchase materials and print documents to support training such as manuals and user guides. The total project cost for these items is \$12,000. The request for these items in year one is \$2,000, in year two is \$5,000, and in year 3 is \$5,000.

6. Contractual

Northwest Regional Educational Laboratory (NWREL):
NWREL will provide the research and analysis portion of the grant project.

7. Construction

None

8. Other

Stakeholder meetings:
Materials, supplies, refreshments, room rentals, etc. for stakeholder meetings

Workgroup committee meetings:
Materials, supplies, refreshments, room rentals, etc. for stakeholder meetings

Teacher release/substitute time to attend professional development events:
Calculated at a rate of \$200 per day per teacher. We anticipate needing to provide release for a minimum of 200 teachers per year of the project.