

ILO GROUP, LLC



STATE OF RHODE ISLAND

RFP21000563

**K-12 School and Higher Education
Reopening Plan Consulting Services**

TECHNICAL PROPOSAL

APRIL 13, 2021

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Executive Summary

As a Rhode Island founded and based consulting firm, ILO Group is pleased to respond to this Request for Proposals and have the potential to impact the students and communities of Rhode Island by assisting in the safe reopening of schools and state colleges and universities and addressing learning loss for K-12 students.

Earlier this year, states and districts across the country began wrestling with how to effectively reopen following school closures caused by the COVID-19 pandemic. Because the U.S. has never faced an analogous challenge before, educators and leaders needed to navigate the complexities brought on by many unknowns and remain nimble as priorities shifted day to day. Partners at ILO Group played a pivotal role in the dissemination of facts, research, information, and tools to education systems across the nation and internationally, including directly supporting a selective community of more than three dozen highly-effective K-12 system leaders, impacting one in three students in the nation.

Partners at ILO Group built high-performing teams that collaborated effectively to develop a series of tools and plans for K-12 education leaders focused on the intersection of academic and health priorities, and then supported these leaders and their teams in implementation. The series includes:

- “Day In the Life Of” (DILO) simulations, starting with school reopening for the 2020-21 school year to test processes, identify gaps, refine plans, and share those plans with the community, and adding DILOs for COVID-19 testing in schools and school-based vaccination programs as systems needs expanded.
- A School Reopening Workbook, a project planning tool for teams to use as a baseline 100-day plan to inform operational decisions about the return to school.
- Webinar series, separate ones for district and for state leaders, to plan for fall 2020 reopening, monitor and evaluate progress.
- A series of tools, including a project planning workbook, DILO simulations, animated videos, tabletop exercises, frequently asked questions document, and webinars to support districts in starting school-based COVID-19 testing and vaccination programs.
- A report that provides guidance based on the best available research and experiences of highly-effective K-12 systems leaders.

While Rhode Island’s current progress on vaccinations is cause for hope, experts agree that COVID-19 testing, among other mitigation strategies, are going to be important to ensure all students can return to in-person learning five days a week for the 2021-22 school year, including K-12 and state colleges and universities. In addition, the state will need a plan for student COVID-19 vaccinations and a plan for the possibility of COVID-19 booster shots for inoculated staff members as variants arise. The proposing team of ILO Group has the expertise and experience across education and health to help.

Additionally, it will take a significant amount of time, resources, and coordination to fully understand and address the learning loss that students have experienced. After an exhausting year, school districts cannot be expected to do this difficult work alone. Leveraging federal investment, Rhode Island can unlock municipal and community capacity to support students. The

Cumberland Office of Children Youth and Learning (OCYL), a municipal office created during Governor McKee's tenure as Mayor of Cumberland, is a powerful example of how municipal (i.e., non-LEA) resources can support early childhood education and youth civic engagement while fostering a deep sense of belonging among young people that research shows is critical to their long-term success. While every municipality may not choose a design precisely like OCYL, many will benefit from the advice and support of ILO Group in designing their own approach to municipal learning and youth development. Partners and consultants within our organization have deep experience with city-level initiatives designed for large social impact and are eager to support Rhode Island municipal leaders in these efforts.

We are confident that ILO Group has the expertise and capacity to empower Rhode Island government, education, health, and community leaders with the tools and resources needed to return to in-person learning for all students across K-12 and state colleges and universities and to address student learning loss. We also believe there is an extraordinary opportunity to design and create the infrastructure for systems to better serve Rhode Island students in a way that is both equitable and sustainable.

We are prepared, qualified, and eager to partner with the state to provide oversight and coordination with regards to K-16 school reopening, federal relief funding, and addressing learning loss resulting from the pandemic. And, as a Rhode Island founded and based firm, we are deeply invested in the success of this project.

Staff Qualifications

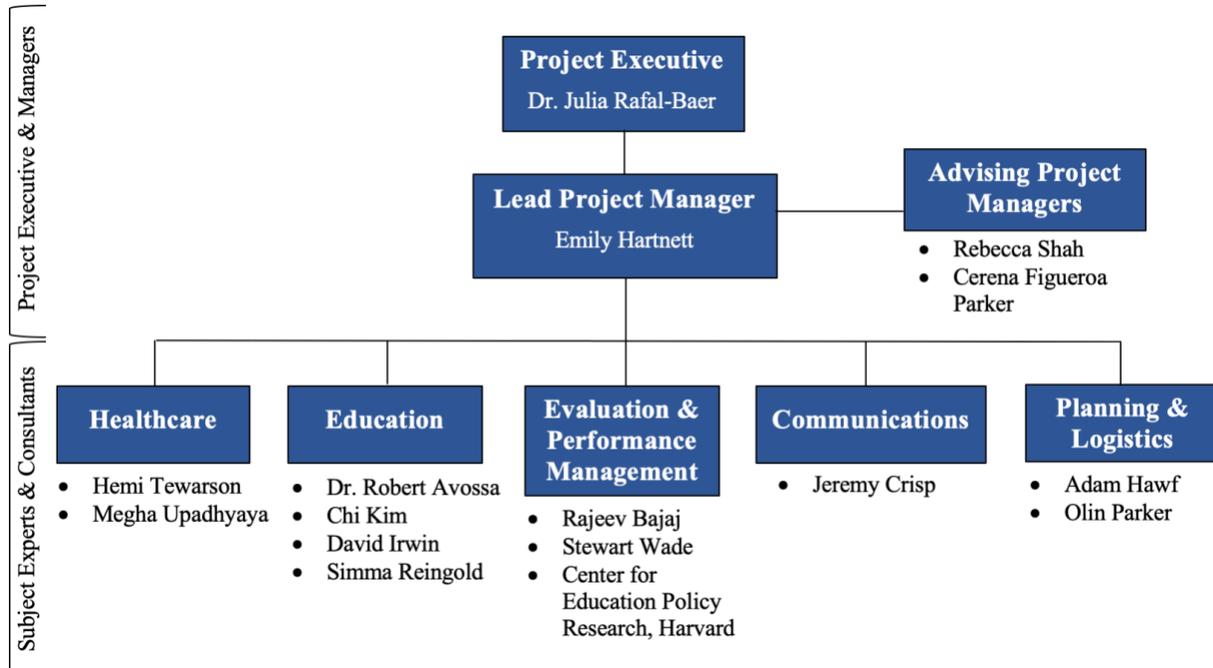
ILO Group believes in the power and importance of leaders and works to empower and enable these leaders, especially women leaders and leaders of color, to make an impact on students and families on a system-wide level. In that spirit, ILO Group will lead and manage the proposed School Reopening project for the State of Rhode Island, bringing health, education, and evaluation leaders and experts together to plan, advise, implement, communicate, and evaluate K-12 public school reopening, higher education reopening, learning loss catch up services, and non-LEA municipal learning programs.

Partners at ILO Group have extensive experience in state and district education leadership, oversight, and project management. With more than six decades of non-profit, education, and government experience combined, ILO Group's work extends from the most complex areas of state and federal policy and budget analysis to the most difficult challenges of district operations and city-wide initiatives. ILO Group and its partnering technical assistance providers and top-tier research institutions work to scale innovative approaches, lead strategic efforts, and communicate them effectively to the public.

To support Rhode Island with school reopening, ILO Group brings together key organization and individual partners to provide maximum efficiency, effectiveness, and impact on all aspects. Under coordination and management by ILO Group, the team will be composed of dedicated staff members from ILO Group, the Center for Education Policy Research at Harvard University, Thru Consulting, Grand Isle Group, as well as subject matter experts, including Hemi Tewarson, Visiting Senior Policy Fellow at the Margolis Center for Public Health at Duke University; Dr. Robert Avossa, experienced district superintendent and leader; and Chi Kim, expert district superintendent and national social and emotional learning (SEL) expert, amongst others.

The proposed team of organizations and expert consultants are former educators, parents, researchers, and professors. Our team has a track-record of successful, collaborative projects with highly diverse teams, and have led and supported state and government agencies, large and small districts and LEAs, and non-profit and education organizations in executive, advising, financial, health, academic, and operational roles. The core team of consultants has achieved substantive results across multiple projects, all with the overarching goal of student success, achievement, and well-being.

Key representatives of the proposed project team can be found below. ILO Group may also leverage its extensive network of health, education, communications, and evaluation experts to assist with and support project components, as needed.



Team Member & Areas of Expertise	Resume
<p>Dr. Julia Rafal-Baer <i>Subject Matter Expert</i></p> <ul style="list-style-type: none"> ○ Policy and Programmatic Implementation ○ Risk Management ○ Crisis Supports ○ Policy Implementation ○ Leadership and Cabinet Coaching 	<p>Dr. Julia Rafal-Baer has dedicated her career to the fight for educational opportunity, especially for underserved students. She entered the education field as a teacher and has continued to build on her experiences working to close gaps for all students in every role since. Her roles in education span operational and policy. Dr. Rafal-Baer is a deeply experienced and trusted leader who has developed, trained, and worked closely with many of the nation’s most effective, innovative state education leaders and superintendents. She is a seasoned leader of complex organizations who deeply understands strategic planning, execution of high-profile initiatives, and building high impact, high growth, and collaborative teams. Dr. Rafal-Baer was Assistant Commissioner of the New York State Education Department under Dr. John B. King, Jr. Her primary focus has been leading and helping others to lead the building of high-performance, high-growth, and high-impact organizations. She began her career as a special education teacher in the Bronx and has also worked as a special education content specialist and an instructor in the United Kingdom. Dr. Rafal-Baer holds a Ph.D. with a focus in comparative education policy and a master’s in philosophy in education research from the University of Cambridge, where she was a Marshall Scholar; a dual master’s from CUNY: Lehman College in Special Education and Childhood Education; and a bachelor’s in psychology from The George Washington University. In 2020, Dr. Rafal-Baer was appointed to a four-year term to the National Assessment Governing Board. See LinkedIn here for full bio.</p>
<p>Hemi Tewarson <i>Subject Matter Expert</i></p> <ul style="list-style-type: none"> ○ Healthcare Systems ○ State Health Policy Research ○ COVID-19 Testing and Containment 	<p>As a Duke-Margolis Visiting Senior Policy Fellow, Hemi Tewarson has senior strategic responsibilities in the Center’s continued development and expansion of a substantial state health policy research and analysis program at the Margolis Center for Public Health at Duke University. Specifically, Hemi strengthens the Center’s engagement in state-level COVID-19 response, including such areas as new models of care and effective strategies for COVID-19 testing and containment. Previously, Hemi served as the director for the Health Division of the National Governors Association’s (NGA) Center for Best Practices,</p>

	<p>overseeing a broad project portfolio including Medicaid transformation and coverage, Medicaid data systems, health care delivery and payment system reform, workforce, opioids, and behavioral health and social determinants. Prior to joining NGA, Hemi served as senior attorney for the Office of the General Counsel at the U.S. Government Accountability Office. In February 2021, Hemi was named to the 20-person Rhode Island's COVID-19 Advisory Group. See LinkedIn here for full bio.</p>
<p>Dr. Robert Avossa <i>Subject Matter Expert</i></p> <ul style="list-style-type: none"> ○ System Leadership ○ Strategic Redesign ○ Continuous Improvement ○ Leadership Coaching 	<p>Dr. Robert Avossa was School Superintendent of Palm Beach County 2015-2018; the District is the 10th in the country with a student enrollment of approximately 200,000 students. Prior to joining Palm Beach County Schools, Robert served as Superintendent of Fulton County Schools (GA) for 4 years (2011-2015). Robert was responsible for 96,000 students, 101 schools, 14,000 employees, and a \$1.4 billion-dollar budget. Under Avossa's 7 years at the helm, both Palm Beach and Fulton County Schools achieved dramatic academic gains, earning each District the highest graduation rate in both Florida and Georgia's large school systems respectively. Robert also served 5 years as an executive leader for Charlotte-Mecklenburg Schools in North Carolina. Dr. Avossa started his career as a teacher and principal in Florida. See LinkedIn here for full bio.</p>
<p>Chi Kim <i>Subject Matter Expert</i></p> <ul style="list-style-type: none"> ○ Social Emotional Learning Expert ○ System Leadership ○ Mental Health ○ Supportive Environments ○ Learning Ecosystems 	<p>Chi Kim is an expert in social and emotional learning and a former California school superintendent. She also served as school principal, teacher, leadership coach and program officer at the Bill & Melinda Gates Foundation. She is co-founder of the Teaching Garden program that was adopted by the American Heart Association to support heart health through school gardens. Chi is a 2018 Pahara-Aspen Education Fellow, serves as the Board Chair & Trustee of the Great Minds nonprofit board, a member of CASEL Board of Directors, and Coalition for Career Development Center. She also sits on the advisory councils of SEL4US, Project Wayfinder, Center for Reaching and Teaching the Whole Child, and Family Code Night/MV GATE. She earned an XPT Performance Breathing Certification and Oxygen Advantage Functional Breathing Certification. See LinkedIn here for full bio.</p>
<p>David Irwin <i>Subject Matter Expert</i></p> <ul style="list-style-type: none"> ○ Strategic Planning ○ High Impact PK-12 Strategic Framework ○ Quarterly/Annual Management Planning 	<p>David Irwin is the former Executive Director of District Administration and K-12 Education practice leader for Gartner Inc. For more than 15 years he has helped school district leaders, state education agencies develop strategies, support requirements gathering, lead the selection process and oversee the implementation of countless student information system implementations. His experience includes leading the development of the most recent SBBC IT strategic plan as well as supporting the strategy and implementation of SBBC's current Digital Learning Platform. David currently serves an elected school board member in Madison, NJ serving on the Operations and Education Committee as well as a board member of the non-profit math curriculum company, FiCycle. See LinkedIn here for full bio.</p>
<p>Rajeev Bajaj <i>Subject Matter Expert</i></p> <ul style="list-style-type: none"> ○ Performance Management ○ Large-scale Implementation Design in Education ○ Finance 	<p>Rajeev Bajaj began his career in education over a decade ago as an elementary school teacher at PS 161 in Harlem. After his time in the classroom, he transitioned to key leadership roles at the New York City Department of Education, including Managing Director in the Office of Accountability. Rajeev served as President of Sangari Global Education, an education services provider that delivers inquiry-based science educational materials to over 500,000 students worldwide, prior to serving as Partner & CEO of Kitamba. Prior to his work in education, Rajeev began his career in technology first at Microsoft and later as part of the core team that launched Jamcracker, a web services provider based in Silicon Valley. Rajeev graduated from Northwestern University with a B.S. in Industrial Engineering/Management Sciences and has a Master's degree in Education from Hunter College. He is a recipient of a Fulbright Teaching Fellowship through the Fulbright Memorial Fund-Japan. See LinkedIn here for full bio.</p>

<p>Jeremy Crisp <i>Subject Matter Expert</i></p> <ul style="list-style-type: none"> ○ Branding and Marketing ○ Communications Strategy ○ Public Relations 	<p>Jeremy Crisp left his homeland of Ireland to join NAIL Communications. A graduate of the respected Trinity College in Dublin, Jeremy spent nine years on the client side of marketing and communications with Sega, Guinness, Britvic (makers of popular UK soda Tango), and finally Nestlé. He then transitioned to the agency side, joining QMP Publicis as Deputy Managing Director. From there he moved to JWT where as Managing Director he oversaw many of Ireland’s most visible and successful campaigns for brands like Amstel, Microsoft and The National Lottery. In 2007, Jeremy joined NAIL Communications as Managing Partner and expanded the company’s client list to health care, defense, solar power, and media categories; clients include New Balance, Keurig, Stanley, COX, Mike & Ike, and Brown University. Jeremy helped NAIL win a Gold Effie award as well as a Gold in the Jay Chiat Awards for Strategic Excellence. See LinkedIn here for full bio.</p>
<p>Emily Hartnett <i>Project Manager</i></p> <ul style="list-style-type: none"> ○ Project Management Systems ○ Organization Expansion and Restructuring ○ Strategic Planning ○ Federal Grant Management and Oversight 	<p>Emily Hartnett has spent over a decade leading and supporting education organizations through start-up, expansion, and strategic improvement phases, assisting with project management and goal-aligned action planning. Previously, Emily served as Chief of Strategy & Advancement of InspireNOLA Charter Schools, where she led strategic planning and growth initiatives that resulted in 325% growth over 5 years, and oversaw human resources, talent, communications, community, external relations, and data departments for the organization. Her core responsibilities included expansion efforts, long-term planning, evaluating organizational health, fundraising, and cultivating external partnerships. She began her career as a second-grade teacher and later served as an education consultant, curriculum director, administrator, and instructional coach. Emily holds a master’s in Education Leadership from Columbia University, Teacher’s College and a bachelor’s in political science and business from Tulane University. See LinkedIn here for full bio.</p>
<p>Rebecca Shah <i>Project Manager</i></p> <ul style="list-style-type: none"> ○ PMP Certified ○ Change Management, with a focus on state government ○ Performance Management Systems ○ Coalition Building and Strategic Partnerships 	<p>Rebecca Shah is a certified project management professional with experience changing mindsets in government systems. She consults with education leaders at the state and district level and is a trusted advisor and technical assistance provider. Previously, Rebecca served as the Chief of Staff at the Tennessee Department of Education where she led the transition under Commissioner Penny Schwinn to shift department culture to an outcomes orientation. This included the launch of a new performance management system codifying all work streams at the department and developing a custom-built dashboard for progress monitoring. She has served as the Director of Academics Strategy and Performance at the Texas Education Agency and spent eight years at a national education nonprofit supporting research and policy analysis and organizational development. See LinkedIn here for full bio.</p>
<p>Cerena Figueroa Parker <i>Project Manager</i></p> <ul style="list-style-type: none"> ○ Workflow Optimization ○ Meeting Facilitation ○ Financial Data Management ○ Community Outreach 	<p>Ms. Parker’s experience includes all elements of start-up support from developing infrastructure and implementing operations and financial goals, policies, systems, and procedures to building and developing high-performance, diverse teams and leading the execution of new projects. Her operational leadership sits at the intersection of health and education with the execution of multi-million-dollar projects that support the reopening of schools during COVID-19. She has served as special assistant to the CEO of (RED) where she provided support for high-level strategy initiatives, launching special projects and events, and managing board relationships. Prior to (RED), Cerena worked at the New York Early Childhood Professional Development Institute at the City University of New York as a manager of special projects and special assistant to the executive director. In this role, Cerena implemented a digital marketing strategy, planned special events, and supported the executive director in managing relationships and</p>

	strategy. She began her career in mental health counseling working with veterans returning from Iraq and Afghanistan. See LinkedIn here for full bio.
<p>Adam Hawf <i>Project Consultant</i></p> <ul style="list-style-type: none"> ○ School Reopening & COVID-19 Testing ○ Project and Performance Management Systems ○ Coalition Building and Strategic Partnerships ○ Finance and Budgeting 	<p>Adam Hawf is the managing partner of The Grand Isle Group, LLC, a management consulting firm that partners with entrepreneurial leaders to transform government agencies, non-profit organizations, and corporations. Over the last decade, Adam has served in several senior governmental roles in Louisiana. Most recently, he served as the Assistant Superintendent of Schools for the Orleans Parish School Board. From 2011 through 2014, Adam served as an Assistant Superintendent and Deputy Superintendent for the Louisiana Department of Education and the Louisiana Recovery School District respectively. Prior to his transition to government service, Adam worked in the private sector. Adam graduated summa cum laude and Phi Beta Kappa from Tulane University in New Orleans. See LinkedIn here for full bio.</p>
<p>Olin Parker <i>Project Consultant</i></p> <ul style="list-style-type: none"> ○ Program Management & Execution ○ Data Management ○ School Accountability & Support 	<p>Olin Parker is an elected school board member in New Orleans and has spent his entire career in education. Most recently he was responsible for overseeing school accountability at the Louisiana Department of Education. In this role, Olin managed multiple statewide programs and federal grants that impacted tens of thousands of students annually, designed and implemented support and accountability frameworks impacting hundreds of schools, and redesigned state grant processes. Prior to his work in state government, Olin was a data management professional and educator. He has a Master’s in Public Policy from the Harvard Kennedy School and graduated Phi Beta Kappa from Hofstra University. See LinkedIn here for full bio.</p>
<p>Megha Upadhyaya <i>Project Consultant</i></p> <ul style="list-style-type: none"> ○ Healthcare ○ Change Management, with a focus on state government ○ Technical Writer ○ Project Management 	<p>Megha Upadhyaya is a public health and education professional. She spent several years at the Louisiana Office of Public Health, HIV/STD Program managing HIV testing data and prevention programs. She then served at the Louisiana Department of Education with a focus on policy analysis, strategy and grants management. During the 2020 election cycle she served on several campaigns including for then Senator Kamala Harris, Senator Elizabeth Warren and managed a campaign for the Texas House. Born in Texas, Megha is a graduate of the University of Texas at Austin and holds graduate degrees in Public Health and Pharmacology from Tulane University. See LinkedIn here for full bio.</p>
<p>Simma Reingold <i>Project Consultant</i></p> <ul style="list-style-type: none"> ○ Strategic Planning ○ High Quality Instructional Materials Selection ○ New School Design ○ Community Engagement 	<p>Simma Reingold has supported many large cities and urban districts to creatively explore how we can close the achievement gap and expand equitable access to high-quality learning experiences for all students. Highlights of the past few years include assisting district leadership teams to procure standards-aligned core curriculum, build digital ecosystems to seamlessly integrate student data, and develop student-centered learning models to guide learning and teaching transformation. She has shared her expertise as a technical advisor to the Gates Foundation, presenter at iNACOL and Learning Forward Conferences, as well as being a contributor to a variety of education publications. Prior to Thru, Simma was a Managing Partner at Education Elements and a Director at Gartner, Inc focused exclusively on building relationships and managing projects in K-12 Education. She started her career supporting large scale software implementations, gaining critical expertise in project management and application configuration. See LinkedIn here for full bio.</p>
<p>Stewart Wade <i>Project Consultant</i></p>	<p>Stewart Wade previously served as the Project Director for the New York City High School Admission Study, a multi-year, mixed-methods study that developed, implemented, and evaluated a range of informational interventions to</p>

<ul style="list-style-type: none">○ Empirical Evaluation○ Large-scale Research Design in Education○ Mixed-Methods Studies	help NYC 8th graders make more informed high school choices. The study involved analyses of historical data on high school choices in NYC, surveys and interviews with school counselors, parents, and middle schoolers, and field experiments in over 400 middle schools. Prior to joining Kitamba, Stewart served as Director of Enrollment Research, Analytics and Policy for the NYC Department of Education where she studied the impacts of admissions policies on enrollment and school segregation. See LinkedIn here for full bio.
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In addition to the individual key team members listed above, we plan to work with the Center for Education Policy Research at Harvard University regarding evaluation services. Please see Appendix A for their letter of support. Additional support team members will be assisting ILO Group and the project team with administration of the project.

Capability, Capacity, and Qualifications of the Vendor

ILO Group has composed a cross-functional team of health and education leaders, project managers, content experts, and strategic advisors. Collectively, the proposed project team has the expertise, credibility, and track record at the intersection of health and education that will lead to safe school reopening and a plan to address learning loss for Rhode Island. Importantly, the ILO Group is founded and based in Rhode Island and with a deep expertise and understanding of the unique components of the Rhode Island education, health, and workforce ecosystem.

Our team has the depth of experience in leading at both the district and state levels, and coordinating and managing complex initiatives across Governor’s offices, states, districts and schools. The team and project, inclusive of ILO Group, the Center for Education Policy Research at Harvard University, and other health, financial, education, and evaluation experts, will be coordinated and managed by ILO Group across all work streams, resulting in a cohesive and impactful plan and support for Rhode Island School Reopening. This is a team with a track record of successful collaboration and collective impact.

Team members have provided project coordination and comprehensive support to government, state and district-level education and nonprofit leaders across multiple projects and topics, including with projects in similar size, scope, and complexity to the proposed work. The team will operate closely, aligning work across functional areas and collaborating across work streams to ensure a comprehensive approach in supporting the State of Rhode Island, inclusive of the Rhode Island Department of Education, Rhode Island Department of Health, and the public Local Education Agencies.

In addition to the team members listed above, if ILO Group is awarded this project, we will finalize an appropriate scope of work with the Center for Education Policy Research (CEPR) at Harvard University. CEPR will provide expertise in evaluating the interventions, and provide a Strategic Data Project Fellow position to the State for this project. We are sharing an initial vision for this collaboration on the research methodology below.

Our collective experience spans all aspects of the Reopening Schools project for Rhode Island. Provided below are overviews of relevant experience related to state, district, and cross-entity project management, guidance, and supports.

Examples Related to School Reopening and COVID-19 Testing	
<u><i>COVID Testing Planning and Implementation Materials</i></u> We are key members of a team that created a suite of tools and resources that districts of any size can use to implement routine, widespread Covid-19 testing programs. These resources included a project planning	<u><i>School Reopening Convenings and Resources</i></u> We formed partnerships with national and international organizations to assist with planning and beginning execution of school reopening, staying abreast of and informed by trends and data.

<p>workbook, related tabletop exercises, a document with answers to frequently asked questions, and “Day in the Life Of” simulations that can help systems determine how a testing program would fit into a typical day for students and staff. There are video versions (Positive Test, Negative Test, Full Video) of the case studies on COVID-19 testing that complement the school reopening DILO simulations, and a detailed step-by-step playbook, Covid-19 Testing in K-12 Settings: A Playbook for Educators and Leaders, to help educators, leaders and their public health partners design and implement effective Covid-19 testing programs in schools.</p>	<p>To provide immediate assistance and crisis response supports, we hosted seven interactive webinars with state chiefs, district chiefs, and senior district leaders touching all 50 states; topics included planning for fall reopening, reopening preparedness, and monitoring and evaluating aspects related to reopening. Our team also created and published documents and district examples to help district leaders navigate school reopening, including reopening survey examples and continuous learning plan examples.</p> <p>In addition to resources, we also provided direct technical assistance to districts across the country and created School Health Tracker, a COVID tracking tool, and supported districts in tailoring the online software to ensure it is usable within existing systems and is effective.</p>
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<p><u><i>Published Articles to Assist Government, State, & District Leaders</i></u></p> <p>Since March 2020, the team has published numerous research-based articles:</p> <ul style="list-style-type: none"> - District Administration: “Mitigation, reporting, stability: How we can reopen schools safely now” - District Administration: “How districts can pressure-test reopening plans, account for all scenarios” - District Administration: “The Challenge of reopening: 4 factors that tend to impede a response, and how to overcome them” 	
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Examples Related to Federal Funding	
<p><u><i>Baltimore City Public Schools</i></u></p> <p>In Baltimore, with funding in part through the federal Race to Top resources, we supported various district transformation efforts including aligning federal spend at the district level for critical student-centered priorities. In various efforts, we led the design of a school performance framework and the design of a network support structure for schools. This included the design of central vs. school-</p>	<p><u><i>Office of the State Superintendent of Education, Washington, DC</i></u></p> <p>We worked with the Office of the State Superintendent of Education in Washington, DC to support prioritization of federal resources. We created a performance-based approach for access to resources. In addition, we completed ongoing financial and related analysis to support ongoing monitoring and technical assistance to grantees.</p>

<p>based decision-making and support structures and the design of a principal choice / affiliation structure. This work resulted in a network management structure and a clear path to autonomy for schools and autonomy / accountability model with central office.</p>	
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Examples Related to Academic Expertise & Experience

<p><u>Wake County Public School System (WCPSS), NC: High Quality Instructional Materials Adoption</u></p> <p>WCPSS educates students in one of the fastest growing communities in America. Over the past five years, our team has collaborated with leaders to design and open 10 new schools, focusing first on aligning to community needs with principal vision and instructional support. We have also assisted the team to select and implement high quality instructional materials in core subject areas, including the design of professional development support for teachers aligned to these materials.</p>	<p><u>Broward County Public Schools (BCPS), FL: Implementation of New Instructional Materials</u></p> <p>BCPS is the 6th largest district in the United States serving 250,000 students. Members of this team supported BCPS to analyze the current-state, and create-future state, organizational processes, capabilities, systems and structures in order to develop capability models and roadmap for moving teaching and learning to the desired future state for high-quality curriculum alignment, adoption and the implementation of new instructional materials across the entire district.</p>
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Example Related to Evaluation

<p><u>School Districts in Delaware, Indiana, South Carolina, and Texas: Empowering Educators to Excel (E3)</u></p> <p>We are currently serving as an evaluation partner for the Empowering Educators to Excel (E3) project, funded by a Teacher and School Leader (TSL) Incentive Program grant from the US Department of Education. The goal of the E3 project is to increase student achievement in 47 high-need schools across five districts by connecting educators in a Networked Improvement Community focused on improving teacher and principal capacity. Our evaluation design includes analyses of teacher effectiveness and student achievement, teacher retention and recruitment patterns across districts, and the equitable distribution of effective teachers across diverse populations. In addition, our evaluation supports the implementation of the E3 strategy through the creation of custom dashboards and tools that streamline teacher participation while enabling administrators to make data driven decisions for targeted support.</p>

REFERENCES

Aleesia Johnson

Superintendent
Indianapolis Public Schools (IN)

johnsonal@myips.org

317-226-4000

Date of Service: 2019-Present

Strategic Advising, Executive Coaching, School Reopening and COVID-19 Management

Dr. Ian Saltzman

Superintendent
Everett Public Schools (WA)

isaltzman@everettsd.org

425-385-4019

Date of Service: 2020-Present

School Reopening, COVID-19 Testing, and High-Quality Instructional Materials Review

Andres Alonso

Former CEO
Baltimore City Public Schools

Jcadandres@aol.com

201-923-6227; 201-912-0460

Date of Service: 2008-9, 2012-13

Resource Allocation, School Performance Framework

Stefan Huh

Former Director, Charter Schools Program, US Department of Education
Former Director, DC Office of the State Superintendent of Education (OSSE)

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202-724-7803

Date of Service: 2010-12

Federal Funding Planning, Facility Support, Monitoring and Technical Assistance

Michelle Woodson

Senior Director, K-12 Curriculum Development
Wake County Public School System (NC)

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919-431-7400

Date of Service: 2017, 2021

Curriculum Selection (2017) and Tiered Instruction Model (2021)

Brian Kingsley

Chief Academic Officer
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Date of Service: 2019-Present

Change Management for Curriculum Adoption, School Reopening

Andrea Thomas-Reynolds

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800-935-7022

Date of Service: 2018-Present

Empirical Evaluation

Work Plan

ILO Group proposes to lead three distinct work streams to support the Office of the Governor, Department of Health, Department of Education, LEAs and other relevant agencies:

1. School Reopening & COVID-19 Testing
2. Learning Loss, Catch Up, and Accelerated Learning
3. Evaluation & Performance Management

1. School Reopening & COVID-19 Testing		
Component	Work Plan	Deliverables
i. COVID Testing for K-12 School Reopening	<p>Consultant will adapt existing tools and resources developed by partners at ILO Group and create new materials that are RI-specifically focused in order to support COVID-19 testing planning, implementation, and communication. Consultant understands the national COVID-19 landscape and the specifics of RI and will provide tailored guidance, resources, and tools. Tools will include both operational and communication resources.</p> <p>Consultant will provide advice on the implementation of the chosen testing method and potential need for student and staff testing consent forms and tracking mechanisms of consent materials, as well as information documents related to consent policies and requirements.</p> <p>Via informational sessions for RI superintendents, Consultant will utilize “day in the life of” (DILO) case studies - including those specific to diagnostic testing, screening testing using rapid tests, screening testing using molecular PCR, and screening testing using pooled PCR tests - to inform districts of testing program options and assist them in determining the best course of action specific to their district with regards to testing strategies.</p>	<p>RI-specific COVID testing plan for K-12 schools to include:</p> <ul style="list-style-type: none"> - DILO simulation - Test procurement plan, including vendor checklist - Pooled lab identification - Consent form templates - Staffing recommendations - Supply tracker - Data management plan <p>Communication messages, dissemination plan, and daily media and social media monitoring</p> <p>Up to three information sessions for district leaders to understand COVID testing and local decision making</p>
ii. Strategic Advising for RI Government	<p>Consultant will provide strategic advising to the RI governor and the RIDE commissioner, as well as executive coaching and support to the governor’s and commissioner’s cabinets with regards to school reopening and related activities. Consultant will serve as a thought partner for the</p>	<p>Weekly stocktakes for RI governor and RIDE commissioner and support for executing on internal processes</p>

	<p>organizations’ leaders, increasing skill sets, competencies, and project-specific knowledge through targeted feedback cycles and coaching conversations.</p> <p>During the planning phase of the project, Consultant will conduct research on existing approaches from other states to tracking vaccination as well as overcoming vaccine hesitancy among school staff and others in school communities. Consultant will produce a summary report of potential models from various states and analysis of their potential replication viability in Rhode Island.</p> <p>Throughout the duration of the project, Consultant will provide ongoing project management support in developing, maintaining, and reporting out on key metrics through a progress dashboard, including weekly stocktake meetings across project streams. Based on this information and on the work, Consultant will provide advice and recommendations on shifts to approaches, priorities, and strategies, as appropriate.</p>	<p>“On-call” responsiveness to needs that emerge for the RI governor and RIDE commissioner</p> <p>Monthly cabinet member executive coaching sessions for leadership members of both the RI governor’s and RIDE commissioner’s cabinets</p> <p>Summary report on existing approaches to tracking vaccinations and overcoming vaccine hesitancy among school communities</p>
<p>viii. Higher Education Needs Assessment</p>	<p>Consultant will conduct a needs assessment to determine in person reopening feasibility at state colleges and universities, given the entity’s size, student body makeup, commuter population, participation rate in sports and extracurriculars, and operating policies and regulations. This includes, but is not limited to, considerations of pooled COVID-19 testing.</p>	<p>Needs assessment identifying challenges and solutions to offering in person learning at state colleges and universities</p>
<p>ix. K-16 Pooled Testing Project Management and Communication</p>	<p>Consultant will serve as the lead project manager for standing up pooled testing for RIDE, the RI Office of Higher Education, and state colleges and universities. Project management will include organization and communication between participating higher ed institutions, with an ultimate goal of consistency and cross-school collaboration.</p> <p>Consultant will coordinate communication and convenings between the Office of Higher Education, state college and university leaders and</p>	<p>Implementation plan for setting up pooled testing across K-12 and in state colleges and universities; the K-12 portion will be incorporated into the COVID testing plan (from component i.)</p> <p>Communication messages, dissemination plan, and daily media</p>

	<p>departments, external partners, and health systems, including scheduling and leading project meetings, drafting memos and summary documents, and coordinating the slide decks creation, in accordance with appropriate timelines and project scope.</p>	<p>and social media monitoring</p> <p>Weekly project management team meetings with leads from each RI entity, including a progress dashboard</p>
<p>Project Management</p>	<p>To ensure successful implementation of the above, Consultant proposes to serve as the lead project manager for school reopening in Rhode Island. Project management will include organization, prioritization, and communication of all major project components.</p> <p>Consultant will coordinate communication and convenings between state and involved districts, lead organizations, and/or consultants, including scheduling and leading project meetings, drafting memos and summary documents, and coordinating the slide decks creation, in accordance with appropriate timelines and project scope.</p>	<p>Progress dashboard monitoring key metrics</p> <p>Preparation and lead for weekly project meetings, including scheduling, memos and summary documents, slide decks, and agendas</p>

2. Learning Loss, Catch Up, and Accelerated Learning		
Component	Work Plan	Deliverables
<p>iii. Prioritization of Federal Funds to Address Learning Loss</p>	<p>Consultant will support RI leaders in establishing goals to be achieved with federal relief funding. Planning and resource allocation decisions will consider federal funding sources to include ongoing ESEA funds, such as Title 1 part a, IDEA, Title 2, Title 4, and McKinney-Vento, and recent relief funds to include ESSER I (CARES Act), ESSER II (CRRSA Act), ESSER III (ARP Act), and the American Jobs Plan.</p> <p>Consultant may include design criteria such as which students and schools could receive funding? What tradeoffs could be made in precision of the intervention? What type of investment should be considered (e.g., one-time grant, capital investment)? The customizable tool will help guide allocations, manage existing and expanded</p>	<p>Tool to guide RI leader decision making on how to prioritize and spend federal funds</p> <p>Summary report with recommendations on evidence-based, priority-aligned best practices to accelerate learning</p> <p>Weekly project management team meetings to monitor expenditures</p>

	<p>partnerships, and identify short term opportunities and will include practical tips and implementation guidelines for district leaders.</p> <p>Consultant will share examples of what other states and school systems have done or are planning and will interview state and local leaders to understand what investments are already in place or planned in Rhode Island.</p> <p>Consultant will provide advice and consultation on how the funds should be divided, who and what they should be divided between, how they should be dispersed, how they should be spent, and over what time period. This includes long-term planning for sustainability. Once decisions are made by RI leaders, Consultant will lead weekly project management meetings to monitor expenditures in response to RI leader priorities.</p>	
<p>iv. Municipal Learning Programs</p>	<p>Consultant will plan for and lead a process to support RI leaders and stakeholders in developing municipal learning programs within RI to assist districts and their constituents. Details of the methodology and approach (starting on page 21) include assessing current needs and opportunities with a focus on under resourced areas, convening stakeholders to engage in community-based design, evaluating content and service providers, and highlighting criteria for successful implementation and long-term sustainability. Consultant will also advise on how to leverage federal funding in this work.</p> <p>Consultant will prepare a first-year implementation action plan that will be used as the basis for project management. Consultant will then lead project management efforts to ensure the implementation is successful. Consultant will design data dashboards to monitor progress and outcome measures, plan and prepare communication materials to keep stakeholders informed, create collaboration opportunities to discuss successful practices, and lead focus group conversations and survey participating entities to gather first-hand perspective on the programs.</p>	<p>Needs assessment to address learning loss with special attention to under resourced areas</p> <p>First year implementation action plan</p> <p>Weekly stocktakes with data dashboards to monitor implementation progress and outcome measures</p> <p>Compendium of communication materials that can be tailored across municipalities</p> <p>Minimum of 3 professional development sessions for leaders</p>

<p>v. Program Design: Municipal Programs, Summer Catch Up Programs, and State School Reopening</p>	<p>Consultant will support RI leaders in designing municipal programs, summer catch up programs, and state school reopening using a modified version of the methodology and approach (starting on page 21) to account for shorter timelines for summer and school reopening.</p> <p>Utilizing state and district data, Consultant will lead learning loss program design for RIDE and district partners to codify goals, outcomes, strategies, and activities that will be necessary for mitigating and overcoming learning loss in RI schools. Program components may include extended and/or additional learning time efforts, student progress monitoring systems, early-warning systems, and other research-based strategies. This plan will serve as a foundational document in addressing learning loss by being a comprehensive framework utilized in decision-making, resource allocation, and targeting differentiated support that improves state and district performance.</p> <p>Working closely with RIDE, Consultant will lead school reopening design for RIDE and program partners to codify goals, outcomes, strategies, and activities that will be necessary for the successful launch and execution within RI districts and schools. Consultant program design services may include developing a theory of action, identifying organization capacities and key leaders, designing implementation scenarios specific to reopening and testing in the RI K-12 environment, and defining and detailing program components.</p> <p>As explained in detail in the Evaluation & Performance Management section, Consultant will include evaluation components into the design process to demonstrate program impact at all levels.</p>	<p>Research report to grow knowledge of evidence-based practices</p> <p>Lead community design efforts to outline roles and responsibilities and tailor to local context</p> <p>Document potential risks and roadblocks for stakeholders to address</p>
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3. Evaluation & Performance Management		
Component	Work Plan	Deliverables

<p>v. Program Analysis and Evaluation: Municipal Programs, Summer Catch Up Programs, and State School Reopening</p>	<p>Consultant will assemble a small panel, including both researchers and practitioners, to develop a typology of interventions. Consultant will enlist a Harvard Strategic Data Fellow to support evaluation of the interventions. If there are two to three or more interventions that are being implemented in multiple municipalities, have sufficient enrollment, and for which there is a credible comparison group, Consultant will evaluate the outcomes.</p> <p>If it is determined that an evaluation is not possible due to numbers or implementation decisions, then the Consultant will provide guidance on what is needed in future iterations for an evaluation to be possible. Consultant will also provide case studies of best practices in Rhode Island.</p> <p>The Strategic Data Fellowship Program is run by the Center for Education Policy Research at Harvard University. The program strengthens the capacity of education agencies to use data for improvement. The Fellow receives training and network supports from Harvard while serving full-time to increase data capacity from within state government.</p>	<p>Placement of a full-time Harvard Strategic Data Fellow in a RI government entity</p> <p>Summative evaluation report of outcomes in response to chosen interventions</p> <p>Or</p> <p>Guidance to ensure evaluation is possible in future program design and case studies highlighting best practices in RI districts</p>
<p>vi. Equity Review and Initiatives</p>	<p>Consultant will conduct an equity review to examine the impact of learning loss on the most vulnerable students. The review will encompass a review of key programs across the state and within municipalities to provide recommendations for equity-focused strategies for recovery efforts.</p>	<p>Equity review report that examines the impact of learning loss on the most vulnerable students and includes actionable recommendations</p>
<p>vii. Metrics and Accountability of Outcomes</p>	<p>Consultant will develop key metrics to monitor program execution and outcomes, including a process for monitoring implementation of reopening plans and innovations in education policy and practice in the state and municipalities. Consultant will build a custom RI-specific dashboard to monitor and publicly report out on progress toward key outcome metrics. Consultant will review progress with relevant RI government entities during project management meetings and as requested.</p>	<p>Metrics to monitor program execution and outcomes</p> <p>Custom RI-specific dashboard to monitor and report out on key metrics</p>

TIMELINE

The project timeline will be the guide for the team as the project occurs, particularly components within each of the three major work streams. Below is a representation of when each component will begin and end during the duration of the yearlong project. Upon award, a project plan will be developed; it will serve as the foundation for tracking and monitoring progress.

		2021									2022			
		Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr
1. School Reopening & COVID-19 Testing	i. COVID Testing for K-12 School Reopening	◆	◆	◆	◆	◆								
	ii. Strategic Advising for RI Government	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
	viii. Higher Education Needs Assessment	◆	◆	◆	◆	◆								
	ix. K-16 Pooled Testing Project Management and Communication	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
	Project Management	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
2. Learning Loss, Catch Up, and Accelerated Learning	iii. Prioritization of Federal Funds to Address Learning Loss	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
	iv. Municipal Learning Programs	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
	v. Program Design: Municipal Programs, Summer Catch Up Programs, and State School Reopening	◆	◆	◆	◆	◆								
3. Evaluation & Performance Management	v. Program Analysis and Evaluation: Municipal Programs, Summer Catch Up Programs, and State School Reopening	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
	vi. Equity Review and Initiatives	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
	vii. Metrics and Accountability Outcomes	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆

Approach/Methodology

We designed the following approach of four sequential stages based on our experience working with government, state, and district agencies, tailored to the specific goals and components outlined in the RFP.



PLANNING

- Identify the ecosystem of stakeholders to be involved throughout the planning, development and implementation phases. Prepare communications to initiate awareness building activities with these stakeholders, with an eye towards gaining buy-in for the process. (Includes Local Education Agencies, Partner Networks, Local Government Entities, Community Leaders, etc.)
- Assess current community and student needs, with particular focus on the acute impact of the pandemic and the opportunities to address learning loss and accelerate learning throughout the Summer 2021 and SY 2021-2022. Pay special attention to underlying, long-standing inequities and under resourced areas that created conditions for exacerbating the impact of the pandemic. Ensure a complete equity analysis is conducted.
- Apply a strengths-based approach to assessing any existing municipal programs, partnerships, practices and available resources. Build a list that highlights what is working today across communities, what resources are available, and what LEA programming is being put in place to address student social, emotional and academic needs.
- Build an evidence-base of nationally recognized examples of effective supports for students beyond school-based programs. Prepare a list of conditions under which student support can have the most positive impact. Draw from these examples a set of recommendations for RI to increase access to high-quality, evidence-based programs.
- Prepare a research report that can be shared across municipalities, local education agencies, community partners and other stakeholders to grow knowledge of evidence-based practices.
- Use needs assessment and national examples to drive conversations on high-level learning program design, goals and expectations. Prepare a list of program requirements, implementation timeline milestones, and short term / long term outcomes to lead partner selection conversations in the following phase.

PROGRAM DEVELOPMENT & EVALUATION DESIGN

- Convene stakeholders to engage in community-based design, starting at the strategic level with setting the theory of action and moving through action planning to guide the program development. Create spaces for ongoing teamwork, collaborative decision making, and sharing information. Leverage design thinking protocols to collect diverging ideas, elevating traditionally marginalized voices and underrepresented populations.

- Based on learning program requirements and design, evaluate content and service partners from a pool of local and national organizations to provide needed services for students and communities. Support public procurement and contracting processes with partner organizations.
- Outline the roles and responsibilities for different entities in this effort, from the program development through the successful implementation. Guide partners through any community design efforts to tailor their programming specific to the context and needs to municipalities.
- Highlight criteria for successful implementation and long-term sustainability. Document potential risks/roadblocks (e.g., staffing implications, policies changes, funding sources) for stakeholders to address ahead of implementation phase.
- Prepare a first-year implementation action plan that will be used as a base for project management with local partners. Set metrics that will be used to measure progress and monitor implementation fidelity. Design communication processes and feedback loops to be used across stakeholders.
- Set ongoing accountability reporting processes with state and district agencies, partners, and community leaders, as well as any data sharing agreements specific to student information.

IMPLEMENTATION

- Lead project management efforts to ensure that the implementation stays on schedule, within scope and on budget. Provide ongoing support to state and district agencies, partners and other stakeholders through the implementation of learning programs across municipalities. Leading efforts to develop new skills, design new processes and build tools that support the successful implementation of programs.
- Design data dashboards to monitor ongoing implementation progress and outcome measures. Monitor programs with an eye towards ensuring consistency and fidelity of implementation across students, sites, and partners. Align with financial and program operational data to build a comprehensive data story of the impact of new programs.
- Plan and prepare communication materials to keep stakeholders informed of progress and achievements, as well as opportunities for involvement throughout the municipalities. Activate feedback loops to celebrate stories of success and the positive impact of programs on students.
- Create collaboration opportunities (e.g., virtual / in person summits, monthly check-ins) across partners, municipalities, local education agencies and RIDE to discuss successful practices. Encourage ongoing conversations at the local level to discuss specific student progress and addressing acute needs.
- Lead focus group conversations and survey participating organizations / individuals to gather first-hand perspective with the programs. Provide data review and discussion protocols to have critical conversations that will lead to program changes, process improvement, skill development, and additional implementation support.

ANALYSIS & EVALUATION

- Assemble a small panel, including both researchers and practitioners, to develop a typology of interventions. In applying for federal funds, schools and towns will be required to identify which types of interventions they will be offering and to describe

how they will track which interventions individual students are receiving and student attendance at those interventions.

- Compile the response plans from districts and municipalities. Create topology and overall analysis of plans.
- Identify interventions with sufficient overlap and size to be pooled into evaluations.
- Create a plan for data collection on focus interventions. As a condition of receiving federal funding, schools and towns would be required to identify the students receiving each of the focus interventions.
- Describe a set of implementation metrics that districts and municipalities would be required to provide data about back to the research team on a regular basis.
- Link this data to state data and determine which interventions have sufficient numbers enrolled to create impact non-experimental estimates and conduct that analysis.
- If there are two or three key strategic interventions that are a) being implemented in multiple municipalities, b) have sufficient enrollment, and c) for which the researchers can establish a credible comparison group, provide a non-experimental evaluation of the outcomes. A matching methodology will most likely be used to conduct the analysis; though, in some instances, a regression discontinuity design might be possible.
- If it is determined that an evaluation is not possible due to numbers or implementation decisions, then the research team will provide guidance on what is needed in future iterations for an evaluation to be possible and will provide case studies of best practices in Rhode Island.

Attachment: Letter of Support



April 9, 2021

Selection Committee
Reopening Schools RFP

Dear members of the committee,

I am writing in support of ILO Group's submission for the Reopening Schools RFP.

As you know, if schools try to return to business as usual, thousands of students in Rhode Island may end up permanently behind. Although students always arrive at school with varying levels of preparedness, the disparities this fall will be more glaring than in years past. Schools will need to find new ways to differentiate and personalize instruction.

Because different school districts and municipalities will choose different strategies, the state has an essential role to play in pooling districts' data throughout next year and comparing the progress students are making under different strategies. By pooling data from different districts and comparing the progress made by students receiving different supports, Rhode Island can identify which interventions are helping students progress more quickly, which tools they are using to do so, where barriers to learning are being successfully addressed, and where achievement and opportunity gaps still remain. That will allow local decision-makers to know if the strategies they've chosen are the best ones available and to adjust their plans as necessary.

As the faculty director of the Center for Education Policy Research, I am excited about the possibility of working with the ILO Group and Rhode Island to tackle these challenges. If the ILO Group is awarded and we finalize an appropriate scope of work and agreement, we will provide evaluation capacity to the project in the form of a Strategic Data Fellow and will support the state in developing tools to pool data for comparing student progress and evaluating interventions to help kids catch up.

The next school year is going to be challenging. Many of the remedies that districts will choose will work as planned—but some will not. I commend the state for going into the year prepared to learn and to help local decision-makers adjust strategy based on the latest evidence. That's the only way we are going to help students catch up.

Sincerely,

A handwritten signature in blue ink that reads "Thomas J. Kane".

Thomas J. Kane
Walter H. Gale Professor of Education and Economics
Faculty Director, Center for Education Policy Research